



State of West Virginia  
 Department of Administration  
 Purchasing Division  
 2019 Washington Street East  
 Post Office Box 50130  
 Charleston, WV 25305-0130

# Request for Quotation

RFQ NUMBER
EHS12035

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
ROBERTA WAGNER 304-558-0067

RFQ COPY  
 TYPE NAME/ADDRESS HERE

VENDOR

CDP, Inc.  
 1408 Joliet Road  
 Romeoville, IL 60446

SHIP TO

HEALTH AND HUMAN RESOURCES  
 BPH ENVIRO HLTH SERVICES  
 350 CAPITOL STREET, ROOM 313  
 CHARLESTON, WV  
 25301-1757 304-558-8582

DATE PRINTED: 08/11/2011	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
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BID OPENING DATE: 09/15/2011 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	JB		920-49		\$125,000
PHASE 1-CUSTOMIZABLE ENVIRONMENTAL HLTH. DATA SYSTEM  REQUEST FOR QUOTATION  TO PROVIDE AN OPEN END CONTRACT TO PROVIDE AN ENVIRONMENTAL HEALTH DATA SYSTEM THAT SUPPORTS INSPECTIONS, INVESTIGATIONS, REPORTING, BILLING, AND STAFF TIME MANAGEMENT FOR THE OFFICE OF ENVIRONMENTAL HEALTH SERVICES PUBLIC HEALTH SANITATION DIVISION AND LOCAL HEALTH DEPARTMENTS THAT ARE LOCATED ACROSS WEST VIRGINIA PER THE ATTACHED SPECIFICATIONS.  EXHIBIT 3  LIFE OF CONTRACT: THIS CONTRACT BECOMES EFFECTIVE ON AWARD..... AND EXTENDS FOR A PERIOD OF ONE (1) YEAR OR UNTIL SUCH "REASONABLE TIME" THEREAFTER AS IS NECESSARY TO OBTAIN A NEW CONTRACT OR RENEW THE ORIGINAL CONTRACT. THE "REASONABLE TIME" PERIOD SHALL NOT EXCEED TWELVE (12) MONTHS. DURING THIS "REASONABLE TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS WRITTEN NOTICE.  UNLESS SPECIFIC PROVISIONS ARE STIPULATED ELSEWHERE IN THIS CONTRACT DOCUMENT, THE TERMS, CONDITIONS AND PRICING SET HEREIN ARE FIRM FOR THE LIFE OF THE CONTRACT.  RENEWAL: THIS CONTRACT MAY BE RENEWED UPON THE MUTUAL WRITTEN CONSENT OF THE SPENDING UNIT AND VENDOR, SUBMITTED TO THE DIRECTOR OF PURCHASING THIRTY (30)						

RECEIVED  
 28 SEP 28 A 10:22  
 PURCHASING DIVISION  
 STATE OF WV

SEE REVERSE SIDE FOR TERMS AND CONDITIONS			
SIGNATURE <i>M. Holt</i>	TELEPHONE 800-888-6035	DATE 9-26-11	
TITLE Director	FEIN 36-3022123	ADDRESS CHANGES TO BE NOTED ABOVE	

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



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<p>DAYS PRIOR TO THE EXPIRATION DATE. SUCH RENEWAL SHALL BE IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE ORIGINAL CONTRACT AND SHALL BE LIMITED TO TWO (2) ONE (1) YEAR PERIODS.</p> <p>CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICES SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.</p> <p>OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY AUTHORIZE A SPENDING UNIT TO PURCHASE ON THE OPEN MARKET, WITHOUT THE FILING OF A REQUISITION OR COST ESTIMATE, ITEMS SPECIFIED ON THIS CONTRACT FOR IMMEDIATE DELIVERY IN EMERGENCIES DUE TO UNFORESEEN CAUSES (INCLUDING BUT NOT LIMITED TO DELAYS IN TRANSPORTATION OR AN UNANTICIPATED INCREASE IN THE VOLUME OF WORK.)</p> <p>QUANTITIES: QUANTITIES LISTED IN THE REQUISITION ARE APPROXIMATIONS ONLY, BASED ON ESTIMATES SUPPLIED BY THE STATE SPENDING UNIT. IT IS UNDERSTOOD AND AGREED THAT THE CONTRACT SHALL COVER THE QUANTITIES ACTUALLY ORDERED FOR DELIVERY DURING THE TERM OF THE CONTRACT, WHETHER MORE OR LESS THAN THE QUANTITIES SHOWN.</p> <p>ORDERING PROCEDURE: SPENDING UNIT(S) SHALL ISSUE A WRITTEN STATE CONTRACT ORDER (FORM NUMBER WV-39) TO THE VENDOR FOR COMMODITIES COVERED BY THIS CONTRACT. THE ORIGINAL COPY OF THE WV-39 SHALL BE MAILED TO THE VENDOR AS AUTHORIZATION FOR SHIPMENT, A SECOND COPY MAILED TO THE PURCHASING DIVISION, AND A THIRD COPY RETAINED BY THE SPENDING UNIT.</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

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<p>FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.</p> <p>THE TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT SHALL SUPERSEDE ANY AND ALL SUBSEQUENT TERMS AND CONDITIONS WHICH MAY APPEAR ON ANY ATTACHED PRINTED DOCUMENTS SUCH AS PRICE LISTS, ORDER FORMS, SALES AGREEMENTS OR MAINTENANCE AGREEMENTS, INCLUDING ANY ELECTRONIC MEDIUM SUCH AS CD-ROM.</p> <p>REV. 05/26/2009            INQUIRIES:            WRITTEN QUESTIONS SHALL BE ACCEPTED THROUGH CLOSE OF BUSINESS ON 8/30/2011. QUESTIONS MAY BE SENT VIA USPS, FAX, COURIER OR E-MAIL. IN ORDER TO ASSURE NO VENDOR RECEIVES AN UNFAIR ADVANTAGE, NO SUBSTANTIVE QUESTIONS WILL BE ANSWERED ORALLY. IF POSSIBLE, E-MAIL QUESTIONS ARE PREFERRED. ADDRESS INQUIRIES TO:</p> <p>ROBERTA WAGNER            DEPARTMENT OF ADMINISTRATION            PURCHASING DIVISION            2019 WASHINGTON STREET, EAST            CHARLESTON, WV 25311</p> <p>FAX: 304-558-4115            E-MAIL: ROBERTA.A.WAGNER@WV.GOV</p> <p>EXHIBIT 4</p> <p>LOCAL GOVERNMENT BODIES: UNLESS THE VENDOR INDICATES IN THE BID HIS REFUSAL TO EXTEND THE PRICES, TERMS,</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Robt A</i>	TELEPHONE 800-888-6035	DATE 9-26-11
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<p>AND CONDITIONS OF THE BID TO COUNTY, SCHOOL, MUNICIPAL AND OTHER LOCAL GOVERNMENT BODIES, THE BID SHALL EXTEND TO POLITICAL SUBDIVISIONS OF THE STATE OF WEST VIRGINIA. IF THE VENDOR DOES NOT WISH TO EXTEND THE PRICES, TERMS, AND CONDITIONS OF THE BID TO ALL POLITICAL SUBDIVISIONS OF THE STATE, THE VENDOR MUST CLEARLY INDICATE SUCH REFUSAL IN HIS BID. SUCH REFUSAL SHALL NOT PREJUDICE THE AWARD OF THIS CONTRACT IN ANY MANNER.</p> <p>REV. 3/88</p> <p>THE MODEL/BRAND/SPECIFICATIONS NAMED HEREIN ESTABLISH THE ACCEPTABLE LEVEL OF QUALITY ONLY AND ARE NOT INTENDED TO REFLECT A PREFERENCE OR FAVOR ANY PARTICULAR BRAND OR VENDOR. VENDORS WHO ARE BIDDING ALTERNATES SHOULD SO STATE AND INCLUDE PERTINENT LITERATURE AND SPECIFICATIONS. FAILURE TO PROVIDE INFORMATION FOR ANY ALTERNATES MAY BE GROUNDS FOR REJECTION OF THE BID. THE STATE RESERVES THE RIGHT TO WAIVE MINOR IRREGULARITIES IN BIDS OR SPECIFICATIONS IN ACCORDANCE WITH SECTION 148-1-4 (F) OF THE WEST VIRGINIA LEGISLATIVE RULES AND REGULATIONS.</p> <p>PURCHASING CARD ACCEPTANCE: THE STATE OF WEST VIRGINIA CURRENTLY UTILIZES A VISA PURCHASING CARD PROGRAM WHICH IS ISSUED THROUGH A BANK. THE SUCCESSFUL VENDOR MUST ACCEPT THE STATE OF WEST VIRGINIA VISA PURCHASING CARD FOR PAYMENT OF ALL ORDERS PLACED BY ANY STATE AGENCY AS A CONDITION OF AWARD.</p> <p>REV 07/16/2007</p> <p>VENDOR PREFERENCE CERTIFICATE</p> <p>THIS TEAM EXHIBIT HAS BEEN REPLACED BY THE ONLINE VERSION WHICH IS AVAILABLE HERE:  <a href="http://www.state.wv.us/admin/purchase/vrc/venpref.pdf">HTTP://WWW.STATE.WV.US/ADMIN/PURCHASE/VRC/VENPREF.PDF</a></p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>W. L. St...</i>	TELEPHONE 800-888-6036	DATE 9-26-11
TITLE Director	FEIN 36-3022123	ADDRESS CHANGES TO BE NOTED ABOVE

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CDP, Inc.

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<p>NOTICE</p> <p>A SIGNED BID MUST BE SUBMITTED TO:</p> <p>DEPARTMENT OF ADMINISTRATION            PURCHASING DIVISION            BUILDING 15            2019 WASHINGTON STREET, EAST            CHARLESTON, WV 25305-0130</p> <p>PLEASE NOTE: A CONVENIENCE COPY WOULD BE APPRECIATED.</p> <p>THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED:</p> <p>SEALED BID</p> <p>BUYER: -----RW/FILE 22-----</p> <p>RFQ. NO.: -----EHS12035-----</p> <p>BID OPENING DATE: -----9/15/2011-----</p> <p>BID OPENING TIME: -----1:30 PM-----</p> <p>PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID:</p> <p>-----</p> <p>CONTACT PERSON (PLEASE PRINT CLEARLY): Mike Peth</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS		
SIGNATURE <i>Mike Peth</i>	TELEPHONE 800-888-6035	DATE 9-26-11
TITLE Director	FEIN 36-3022123	ADDRESS CHANGES TO BE NOTED ABOVE

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 CDP, Inc.  
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0002	1	JB		920-49		\$50,000
PHASE 2-CUSTOMIZABLE ENVIRONMENTAL HLTH. DATA SYSTEM						
0003	9	EA		920-49		\$15,200
PHASE 3- INSTALLATION - CHARLESTON, WEST VIRGINIA						
0004	31	EA		920-49		\$40,800
PHASE 3- INSTALLATION - BECKLEY, WEST VIRGINIA						
0005	52	EA		920-49		\$62,400
PHASE 3- INSTALLATION - FAIRMONT, WEST VIRGINIA						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Michael B.</i>	TELEPHONE 800-888-6035	DATE 9-26-11
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HEALTH AND HUMAN RESOURCES

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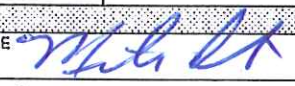
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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0006	25	EA		920-49		\$34,400
				PHASE 3 - INSTALLATION - KEARNEYSVILLE, WEST VIRGINIA		
0007	64	EA		920-49		\$125,600
				PHASE 3 - INSTALLATION - ST. ALBANS, WEST VIRGINIA		
0008	18	EA		920-49		\$24,800
				PHASE 3 - INSTALLATION - WHEELING, WEST VIRGINIA		
0009	3	EA		920-49		\$3,000
				PHASE 3 - TRAINING SESSIONS - CHARLESTON, WV		
0010	3	EA		920-49		\$3,000
				PHASE 3 - TRAINING SESSIONS - BECKLEY, WV		

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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0011	3	EA		920-49		\$3000
				PHASE 3 - TRAINING SESSIONS - FAIRMONT, WV		
0012	3	EA		920-49		\$3,000
				PHASE 3 - TRAINING SESSIONS - KEARNYSVILLE, WV		
0013	3	EA		920-49		\$3,000
				PHASE 3 - TRAINING SESSIONS - ST. ALBANS, WV		
0014	3	EA		920-49		\$3,000
				PHASE 3 - TRAINING SESSIONS - WHEELING, WV		
***** THIS IS THE END OF RFQ EHS12035 ***** TOTAL:						\$496,200

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>[Signature]</i>	TELEPHONE 800-888-6035	DATE 9-26-11
TITLE Director	FEIN 36-3022123	ADDRESS CHANGES TO BE NOTED ABOVE

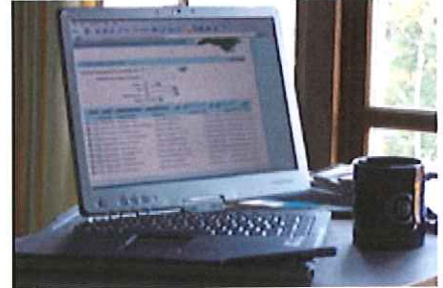
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## Inspection Management Systems

**CDP** provides the public health community with customizable, off the shelf software solutions. CDP is the leader as a Public Health 'Software as a Service' (SaaS) provider. For over 25 years, CDP has and continues to develop customized enterprise health software for our clients, complemented by a full-range of in-house services. **CDP's Inspection Management System (CDPims)** is a web-based, user-friendly application. It is uniquely suited to meet Environmental Public Health's need for a modern system that will help improve service delivery to the public and streamline work processes for everyone involved.



**CDPims** is a web-based, .NET, database-centered environmental health application that includes the inspection & permitting of restaurants, lodging, pools, septic, wells, and much more. Additional features include: foodborne illness investigation, pre-defined as well as ad hoc reports, accounts receivable, and an easy-to-use management tool for tracking employee activities. CDP also publishes complete facility inspection results on the web for viewing by the public as soon as the data is entered into the database; real-time information.

CDP has been providing its Environmental Health solution since 1983. The Food & Lodging, Septic, and Wells solutions have been developed in close coordination with local health department environmental health specialists; thus assuring that the business requirements of the participating counties have been met and that the CDP solutions will be responsive to the business needs of other health departments around the country. In addition, CDP has developed these solutions to respond to the federal & state's changing environmental health rules and legislation.

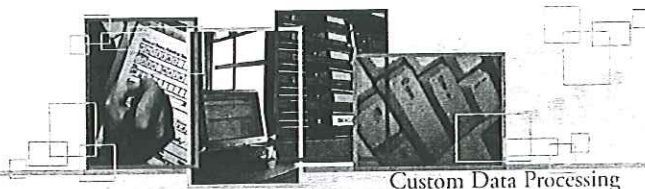
### Benefits of this Approach:

- Zero-based footprint
- Use of standard protocols
- Increased levels of program security
- Data modification tracking
- Integrated table design allowing for increased field validation
- Immediate error validation and notification
- Ability to interface to third party web services (mapping, credit card payments)

Our optional **CDPmobile** data capturing application makes field inspections more efficient and productive. **CDPmobile** streamlines field inspections and reduces paperwork by transferring digital ink forms and digital handwriting directly to the **CDPims** database.

**CDP's** web-based Document Management System (**CDPdms**) is an efficient tool for storing, manipulating and maintaining electronic medical documents that are generated by any **CDPims**-related module. Its features include document scanning, document search, image manipulation, supported and protected by critical role-based security and storage features.

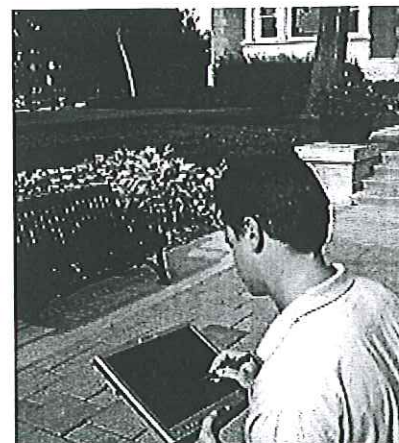
**CDP's** full suite of integrated services for public health elevates our clients above the nation. Our long standing record of collaboration with public health professionals has resulted in systems that represent our clients as the leaders in data management technology for public health. By utilizing our complete suite of products, CDP's clients will move to the forefront in providing comprehensive electronic records for its citizens.



## Mobile

**CDP**mobile – an application for the communication of forms-based data for our enterprise users featuring flexible forms design, highly accurate handwriting data capture & recognition, robust communication and synchronization with our web-based, .NET, database-centered environmental health application (**CDP**ims), handwriting interpretation, verification and data validation.

Through the use of Laptops, Tablet PCs or PDAs, all aspects of operations in the field can be integrated with CDP's Inspection Management System database, including permitting, inspections, complaints, GIS/GPS integration and more.



**CDP**mobile was developed to work off-line to conveniently view inspection history, access demographics, and complete inspections while not connected to the internet out in the field. Later, once connected to the internet, synchronization of the field data to our database takes place -- one of the many benefits of developing with .NET technology. If desired, our users can utilize aircards with their TabletPCs in the field to connect directly to our database. Together the integration with ESRI-based GIS applications and hardware has allowed CDP to offer more from a mobile product than any other vendor in the country today.

The flexibility provided by **CDP**mobile can be found in each of the key processes in forms-based data collection: Electronic Forms Design/Replication, Data Capture, real-time Data Validation, and Information Communication utilizing custom built web services to synchronize data from the field to the servers. Productivity gains for end users are substantial while maintaining a high level of data quality. Additionally, **CDP**mobile eliminates the dual & triple entry of information often found currently throughout public health.

**CDP**mobile is a convenient and easy-to-use data collection system for your enterprise. If your business collects data on paper forms and/or keys in a significant number of records by hand - **CDP**mobile will save you money and time.

Increases the quality of the field data collected

Saves time and money in the data capture process

Provides platform flexibility for when your needs change

Succeeds in bringing the natural pen-on-paper interface to a digital device

Provides the most intuitive form-filling interface imaginable on the market today



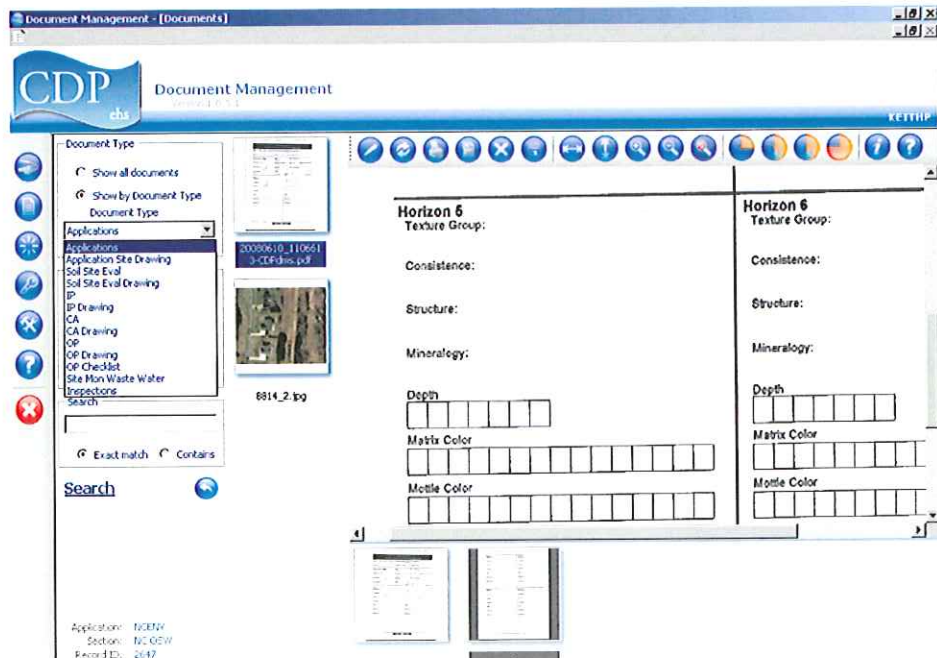
## Document Management System

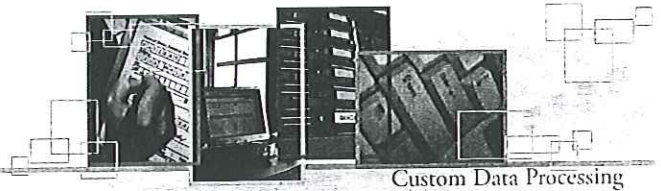
**CDP** provides the public health community with customizable, off the shelf software solutions. CDP is the leader as a Public Health 'Software as a Service' (SaaS) provider. For over 25 years, CDP has and continues to develop customized enterprise health software for our clients, complemented by a full-range of in-house services.

**CDP's web-based Document Management System—CDPdms**—is an efficient tool for storing, manipulating, and maintaining electronic documents. Its features include document scanning, document search and image manipulation, all supported and protected by critical, role-based security and storage features. Additionally, **CDPdms** can be used to manage back office processes that are common to any organization including Accounts Payable, Accounts Receivable and Human Resources. Yet **CDPdms** is also designed to handle the document management needs specific to individual organizations. **CDPdms** integrates seamlessly with existing business software to enhance its functionality. **CDPdms** is widely used in public and environmental health. It has been successfully implemented in state government in a variety of agencies with diverse missions.

### Used by State and Local Governments...

- ◆ To instantly provide documents to multiple users via a central repository.
- ◆ To significantly increase constituent service by improving access to documents.
- ◆ To efficiently meet the most current regulations and reporting standards.
- ◆ To mitigate the impact of agency turnover and staffing changes due to elections.
- ◆ To connect silos of data within and between agencies.





## ***Program Features***

### ***Input and Output...***

- ◆ Use of TWAIN-compliant scanners and input capture devices.
- ◆ Import any native file.
- ◆ Export files to a local file system.
- ◆ Store files via ***CDPdms***.
- ◆ Convert image files to JPEG, GIF, TIFF, PNG, or BMP formats.
- ◆ Combine multiple image files into one multi-page TIFF or PDF file.

### ***Integration...***

- ◆ Can be "plugged-in" to CDP's web applications with minimal modification or database configuration.
- ◆ Can *View* or *Scan* from the web using *ClickOnce*.

### ***Search...***

- ◆ By document type.
- ◆ By document date.
- ◆ By keywords or notes.

### ***Organization...***

- ◆ Easy indexing of single files during scanning.
- ◆ Multiple images can be scanned at once and indexed as needed.
- ◆ Advanced indexing of multiple files at once for large documents.

### ***User Friendly***

- ✓ **Simple menu choices** with help for each menu option.
- ✓ **Right-click options** allow indexing of single documents during scanning or when updating existing documents.
- ✓ ***Set It and Forget It***—the ***CDPdms Quick Scan*** feature allows users to configure their scanner once and use the same settings for all documents.



## Beaufort County Environmental Health Department, Washington, North Carolina



**Organization:** Beaufort County Environmental Health, Washington, North Carolina

**Contact:** Stacey Harris, R.S., Environmental Health Supervisor  
Phone: 252.946.6048 www.bchd.net

**Business Challenge:** The Beaufort County Environmental Health office handles a considerable volume of sanitation inspections of food and lodging facilities as well as numerous evaluations of properties for suitability for an on-site wastewater system. Although workload was being handled as quickly and efficiently as possible, they were searching for new ways to streamline their inspection and permitting processes, organize existing paper files that were taking up large amounts of space within the office, and the ability to search these files more efficiently. Along with this was a desire to reduce the amount of paper files kept in the office and make a more conscious effort to "go green."

**Solution Implemented:** CDPims (inspection management) \* CDPmobile \* CDPdms (document management)

### Summary

Beaufort County Environmental Health is responsible for evaluating, permitting, and inspection of approximately 1,200 properties each year for suitability for an on-site wastewater system. This either involves permitting new systems to be installed, repairs of existing wastewater systems, as well as expansions and inspections of existing wastewater systems. To enhance a comprehensive collection of field data, permits, and recordkeeping the department implemented all three of CDP's systems for these areas. Since implemented, all processes within the department have been streamlined with elimination of several steps of data input within the office as well as a drastic reduction in paper usage. Greater reliability of the data collected has been realized through set business rules within the system as well as quicker access to existing records within the department.

### Previous Process

Clients of the department would come to the office and complete a paper application. This application would then go to the appropriate staff for scheduling. Field staff would then complete a soil evaluation form on paper in the field and use this information in the office to issue the appropriate permit. Permits were handwritten on NCR paper with a copy going to the client, a copy to the building inspections office, and a copy for the office files. Operation permits for installations were generated on paper in the field while inspecting installations of systems. Files within the office were organized by state road and then alphabetically within that file. The average file kept in the office contained 10 pages for each property once all steps of the process had been completed. Existing files within the office dated as far back as 1950 and must be kept until the septic system is no longer in use. Different filing systems over that span of time made it a long and cumbersome process to retrieve records requested by the public. File areas had grown so large that available space for staff within the office was becoming an issue.

### Business Challenge

With a steady flow of applications for evaluations of sites for septic systems and a rapidly growing file storage problem, the office looked for ways to electronically file all existing records as well as make the rest of the application and permitting process as efficient and "paperless" as possible.

**The New Process:** CDPims (inspection management) \* CDPmobile \* CDPdms (document management)

The Environmental Health office had several different objectives they wanted to achieve during this process. Obviously it would have been a huge task to try to implement all three systems at once, so the first objectives to be addressed were:

- Creation of property files for all existing records in an electronic system.
- Image scanning of all current files in order to be allowed to dispose of existing paper records.

### Organization Review

Beaufort County Environmental Health is a division of the Beaufort County Health Department. This agency is employed by the County but acts as authorized agents for the North Carolina Department of Environment and Natural Resources. As mandated by State laws and rules this group is responsible for the carrying out and enforcement of on-site wastewater rules. This includes many facets, such as the evaluation of soils on a site for suitability, the issuance of permits or denials for a proposed site, inspection of septic system installations and issuance of operation permits, investigations of complaints, and inspection of some septic systems on a continual basis.

*Beaufort County utilizes CDP's complete Environmental Health Software Solutions resulting in efficiencies, cost-savings and a higher level of accuracy.*

The department evaluated how to best approach the massive amount of existing files with minimal disturbance of daily operations. Contracting out the scanning of existing records was cost prohibitive so a multiyear approach in-house with temporary staff was implemented. CDPims was chosen to be implemented as the key component to a comprehensive data collection, retrieval, and storage system to best handle the existing data and future data entries as well. Existing properties were entered into the CDPims system to create a searchable database. The existing paper data had to be preserved electronically in a manner that would satisfy the requirements of State Archives. This step was achieved by the use of CDPdms within the CDPims System. CDP's Document Management System allowed the department to create high quality image files of the existing records and associate them with properties within the database being created. Accomplishing this task with all records was a huge undertaking and is still in progress.

Once the handling of all past records had been addressed, the department had to decide what the best method would be to:

- Perform evaluations, permit issuances, and inspections and document them in an electronic format
- Have consistency in the format of permits and the content of each permit.
- Audit data entered by staff.
- Capture soil evaluation data in the field.
- Easily retrieve entered data.
- Minimize paper usage.

The environmental health supervisor began by working with CDP to create forms that would be acceptable for use by staff. This process took some time in order to refine the process before actual implementation of the program. The final production of these newly revised forms was compiled in CDPmobile. CDPmobile has allowed staff to carry tabletPCs in the field and capture soil evaluation data on a form and then save it to upload to the CDPims System once returning to the office. Prior to going in the field with the tabletPCs, staff would download properties from the CDPims system to mobile. This allowed the pre-filling of information in forms with the tap of a stylus versus manual entry of standard fields on the form.



Once back in the office, staff would produce permits in CDPmobile and upload them to CDPims. Paper copies were printed out for the client and all office copies were already saved electronically in the system once uploaded. Staff did have the option of producing permits in CDPims as well, but chose to continue using CDPmobile for this task for consistency. Once these were completed, clerical staff could easily retrieve requested data from their computer instead of sifting through paper files for the information. The supervisor could audit all files produced by staff by searching for each specialist individually for whatever time frame he selected.

#### Challenges

- Increased data entry from applications by clerical staff because previously none was required. Overall time is saved by the ease of access to information once it is entered.
- Some soil evaluation data had to be entered back at the office because of the inability to view the tabletPCs screen in bright sunlight.
- The redesign of forms was challenging because one form was trying to be developed that would satisfy several other counties in NC. Eventually a consensus was reached and a final product produced.
- Some modifications had to be made to some areas of the CDP System to satisfy the requirements of the department, but CDP's staff was quick to act and provide impeccable customer support.
- As staff becomes more familiar with the system each day, there are processes that require changes, as with any new system. The process has now been refined and continually monitored to discover new ways the system could be improved.

#### Benefits

The Beaufort County Environmental Health office realized the following primary benefits:

- Consistency and accuracy of data with required form fields and set business rules built into the program.
- Eventual 100% elimination of property files once scanning of old records has been completed, which will free up a considerable portion of office space.
- Based on previous paper usage of the on-site wastewater section, there was approximately a 56% reduction in paper usage.
- Improved efficiency with rapid access to files by clerical staff.
- Less data input by field staff when creating permits.
- Improved quality assurance of work with the ability to easily audit files.
- Improved data protection with our data being managed (including disaster recovery) at CDP's two datacenters.
- Beaufort County Environmental Health is exploring other functions of CDPims which they have not used frequently, such as complaint and service request entry and tracking of daily activities for State reporting.

*CDP, Inc. is a provider of Enterprise Health Systems to public health organizations. Since 1981, CDP has been a leader in the design, development and implementation of public health software solutions, including environmental health, clinic management, EMR, home health, WIC, online EBT, and integrated electronic document management systems.*



State of West Virginia  
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 2019 Washington Street East  
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# Request for Quotation

RFQ NUMBER
EHS12035

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
ROBERTA WAGNER 304-558-0067

VENDOR	RFQ COPY
	TYPE NAME/ADDRESS HERE
	CDP, Inc.
	1408 Joliet Road
	Romeoville, IL 60446

SHIP TO	HEALTH AND HUMAN RESOURCES
	BPH ENVIRO HLTH SERVICES
	350 CAPITOL STREET, ROOM 313
	CHARLESTON, WV
	25301-1757 304-558-8582

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
09/02/2011				

BID OPENING DATE: 09/29/2011 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
ADDENDUM NO. 1						
1. TO MOVE THE BID OPENING DATE FROM 9/15/2011 TO 9/29/2011 TO ALLOW OEHS ADDITIONAL TIME TO RESPOND TO VENDOR QUESTIONS.						
2. ADDENDUM ACKNOWLEDGEMENT IS ATTACHED. THIS DOCUMENT SHOULD BE SIGNED AND RETURNED WITH YOUR BID. FAILURE TO SIGN AND RETURN MAY RESULT IN DISQUALIFICATION OF YOUR BID.						
EXHIBIT 10						
REQUISITION NO.: EHS12035						
ADDENDUM ACKNOWLEDGEMENT						
I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.						
ADDENDUM NO.'S:						
NO. 1 ..... X						
NO. 2 ..... X						
NO. 3 ..... X						
NO. 4 .....						
NO. 5 .....						
I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS.						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS			
SIGNATURE <i>[Signature]</i>	TELEPHONE 800-888-6035	DATE 9-26-11	
TITLE Director	FEIN 36-302213	ADDRESS CHANGES TO BE NOTED ABOVE	

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<p>VENDOR MUST CLEARLY UNDERSTAND THAT ANY VERBAL REPRESENTATION MADE OR ASSUMED TO BE MADE DURING ANY ORAL DISCUSSION HELD BETWEEN VENDOR'S REPRESENTATIVES AND ANY STATE PERSONNEL IS NOT BINDING. ONLY THE INFORMATION ISSUED IN WRITING AND ADDED TO THE SPECIFICATIONS BY AN OFFICIAL ADDENDUM IS BINDING.</p> <p style="text-align: center;">             .....            SIGNATURE            CDP, Inc            .....            COMPANY            September 26, 2011            .....            DATE         </p> <p>NOTE: THIS ADDENDUM ACKNOWLEDGEMENT SHOULD BE SUBMITTED WITH THE BID.</p> <p>REV. 09/21/2009</p> <p style="text-align: center;">END OF ADDENDUM NO. 1</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS			
SIGNATURE	TELEPHONE 800-888-6035	DATE 9-26-11	
TITLE Director	FEIN 36-3022123	ADDRESS CHANGES TO BE NOTED ABOVE	

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CDP, Inc  
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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	JB	920-49	PHASE 1-CUSTOMIZABLE ENVIRONMENTAL HLTH. DATA SYSTEM		\$125,000
0002	1	JB	920-49	PHASE 2-CUSTOMIZABLE ENVIRONMENTAL HLTH. DATA SYSTEM		\$50,000
0003	9	EA	920-49	PHASE 3- INSTALLATION - CHARLESTON, WEST VIRGINIA		\$15,200

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TITLE Director	800-888-6035	9-26-11
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LINE	QUANTITY	UOP	QAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0004	31	EA		920-49		\$40,800
				PHASE 3 - INSTALLATION - BECKLEY, WEST VIRGINIA		
0005	52	EA		920-49		\$62,400
				PHASE 3 - INSTALLATION - FAIRMONT, WEST VIRGINIA		
0006	25	EA		920-49		\$34,400
				PHASE 3 - INSTALLATION - KEARNEYSVILLE, WEST VIRGINIA		
0007	64	EA		920-49		\$125,600
				PHASE 3 - INSTALLATION - ST. ALBANS, WEST VIRGINIA		
0008	18	EA		920-49		\$24,800
				PHASE 3 - INSTALLATION - WHEELING, WEST VIRGINIA		

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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0009	3	EA	920-49		\$1000	\$3,000
				PHASE 3 - TRAINING SESSIONS - CHARLESTON, WV		
0010	3	EA	920-49		\$1000	\$3000
				PHASE 3 - TRAINING SESSIONS - BECKLEY, WV		
0011	3	EA	920-49		\$1000	\$3000
				PHASE 3 - TRAINING SESSIONS - FAIRMONT, WV		
0012	3	EA	920-49		\$1000	\$3000
				PHASE 3 - TRAINING SESSIONS - KEARNYSVILLE, WV		
0013	3	EA	920-49		\$1000	\$3000
				PHASE 3 - TRAINING SESSIONS - ST. ALBANS, WV		

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 VENDOR  
 CDP, Inc  
 1408 Joliet Road  
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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0014	3	EA		920-49	\$1000	\$3,000
PHASE 3 - TRAINING SESSIONS - WHEELING, WV						
***** THIS IS THE END OF RFQ EHS12035 ***** TOTAL:						\$496,200

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SIGNATURE *[Signature]* TELEPHONE 800-888-6035 DATE 9-26-11

TITLE Director FEIN 36-3022123 ADDRESS CHANGES TO BE NOTED ABOVE

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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
ADDENDUM NO. 2						
1. QUESTIONS AND ANSWERS ARE ATTACHED. 2. TO PROVIDE A REVISED BID PRICE SHEET THAT INCLUDES A LINE FOR TOTAL BID PRICE PER VENDOR QUESTION #25. 3. TO CORRECT THE QUANTITY OF LINE ITEM 5 ON PAGE 6 OF THE RFQ FROM 52 TO 40 PER VENDOR QUESTION #42. 4. ADDENDUM ACKNOWLEDGEMENT IS ATTACHED. THIS DOCUMENT SHOULD BE SIGNED AND RETURNED WITH YOUR BID. FAILURE TO SIGN AND RETURN MAY RESULT IN DISQUALIFICATION OF YOUR BID.						
EXHIBIT 10						
REQUISITION NO.: EHS12035						
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ADDENDUM NO. S:						
NO. 1 . . . . . X						
NO. 2 . . . . . X						
NO. 3 . . . . . X						
NO. 4 . . . . .						
NO. 5 . . . . .						

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SIGNATURE	TELEPHONE	DATE	
<i>M. L. H.</i>	8008886035	9-26-11	
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE	
Director	36-3022123		

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SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE 800-888-6035	DATE 9-26-11
TITLE Director	FEIN 36-3022123	ADDRESS CHANGES TO BE NOTED ABOVE

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EHS12035

**BID PRICE SHEET (ADDENDUM #2 - REVISED VERSION)**

DELIVERABLES (includes all requirements as described in specifications)	Deliverable Due Date	Annual Usage	Unit Bid Price	Bid Price (Annual Usage x Unit Bid Price)
<p><b>PHASE #1:</b></p> <p>Vendor will deliver a base system consisting of a customizable-off-the-shelf environmental health data system that will be configured to meet the needs of OEHS and complies with all of the Business Requirements of this Request for Quotation. Delivery of the base system includes:</p> <ul style="list-style-type: none"> <li>◦ Hosting the Base system</li> <li>◦ Monitoring</li> <li>◦ Maintenance and support of the system and all associated applications for all users</li> </ul> <p>Deliverables for Phase #1 include:</p> <ul style="list-style-type: none"> <li>◦ Confirmation that Base System code has been placed in escrow</li> <li>◦ Verification that OEHS has access to the hosted web site where the environmental health Base System resides</li> </ul>	<p>Year 1 Month 1</p>	<p>1</p>	<p>\$125,000</p>	<p>\$125,000</p>
<p><b>PHASE #2:</b></p> <p>Vendor will deliver a customized environmental health data system that meets the needs of OEHS and complies with the Business Requirements of this Request for Quotation. Delivery of the customized WV Environmental Health Data System includes:</p> <ul style="list-style-type: none"> <li>◦ Develop detailed project plan</li> <li>◦ On-site meeting with OEHS leadership at OEHS office location for review and approval of project plan</li> <li>◦ Execute approved project plan</li> </ul> <p>Deliverables for Phase #2 will be agreed upon by OEHS and vendor based on vendor's project plan which is basis for this phase of the project.</p>	<p>Year 1 Months 1 - 12</p>	<p>1</p>	<p>\$50,000</p>	<p>\$50,000</p>

<p><b>PHASE #3 - INSTALLATIONS:</b> Vendor will schedule and provide on-site installation(s) of WV Environmental Health Data System and software on OEHS and LHD supplied hardware at the following OEHS central and district office locations. Installations will take place during on-site training sessions.</p>	<p><b>Deliverable Due Date</b></p>	<p><b>Estimated Annual Installations<sup>1</sup></b></p>	<p><b>Unit Bid Price<sup>2</sup></b></p>	<p><b>Bid Price (Estimated Annual Installations x Unit Bid Price)</b></p>
<p><b>Charleston, West Virginia</b></p>	<p>Year 1-Month 1 - 12</p>	<p>2</p>	<p>1600</p>	<p>1600</p>
	<p>Year 2-Month 1 - 12</p>	<p>6</p>	<p>4800</p>	<p>6400</p>
	<p>Year 3-Month 1 - 12</p>	<p>1</p>	<p>800</p>	<p>7200</p>
<p><b>Beckley, West Virginia</b></p>	<p>Year 1-Month 1 - 12</p>	<p>4</p>	<p>3200</p>	<p>3200</p>
	<p>Year 2-Month 1 - 12</p>	<p>12</p>	<p>9600</p>	<p>12800</p>
	<p>Year 3-Month 1 - 12</p>	<p>15</p>	<p>12000</p>	<p>24800</p>
<p><b>Fairmont, West Virginia</b></p>	<p>Year 1-Month 1 - 12</p>	<p>12</p>	<p>9600</p>	<p>9600</p>
	<p>Year 2-Month 1 - 12</p>	<p>14</p>	<p>11200</p>	<p>20800</p>
	<p>Year 3-Month 1 - 12</p>	<p>14</p>	<p>11200</p>	<p>32800</p>
<p><b>Kearneysville, West Virginia</b></p>	<p>Year 1-Month 1 - 12</p>	<p>6</p>	<p>4800</p>	<p>4800</p>
	<p>Year 2-Month 1 - 12</p>	<p>6</p>	<p>4800</p>	<p>9600</p>
	<p>Year 3-Month 1 - 12</p>	<p>13</p>	<p>10400</p>	<p>20000</p>
<p><b>St. Albans, West Virginia</b></p>	<p>Year 1-Month 1 - 12</p>	<p>41</p>	<p>32800</p>	<p>32800</p>
	<p>Year 2-Month 1 - 12</p>	<p>11</p>	<p>8800</p>	<p>41600</p>
	<p>Year 3-Month 1 - 12</p>	<p>12</p>	<p>9600</p>	<p>51200</p>
<p><b>Wheeling, West Virginia</b></p>	<p>Year 1-Month 1 - 12</p>	<p>1</p>	<p>800</p>	<p>800</p>
	<p>Year 2-Month 1 - 12</p>	<p>11</p>	<p>8800</p>	<p>9600</p>
	<p>Year 3-Month 1 - 12</p>	<p>6</p>	<p>4800</p>	<p>14400</p>

*M. L. A.*




<p><b>PHASE #3 - TRAINING SESSIONS:</b> Vendor will schedule and provide on-site training sessions of WV Environmental Health Data System and software on OEHS and LHD supplied hardware at the following OEHS central and district office locations.</p>	<p>Deliverable Due Date</p>	<p>Estimated Annual Training Sessions<sup>1</sup></p>	<p>Unit Bid Price<sup>2</sup></p>	<p>Bid Price (Estimated Annual Training Sessions x Unit Bid Price)</p>
<p>Charleston, West Virginia</p>	<p>Year 1-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
	<p>Year 2-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
	<p>Year 3-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
<p>Beckley, West Virginia</p>	<p>Year 1-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
	<p>Year 2-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
	<p>Year 3-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
<p>Fairmont, West Virginia</p>	<p>Year 1-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
	<p>Year 2-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
	<p>Year 3-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
<p>Kearneysville, West Virginia</p>	<p>Year 1-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
	<p>Year 2-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
	<p>Year 3-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
<p>St. Albans, West Virginia</p>	<p>Year 1-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
	<p>Year 2-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
	<p>Year 3-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
<p>Wheeling, West Virginia</p>	<p>Year 1-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
	<p>Year 2-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
	<p>Year 3-Month 1 - 12</p>	<p>1</p>	<p>1000</p>	<p>1000</p>
			<p><b>TOTAL BID PRICE</b></p>	<p>\$496,200</p>

<sup>1</sup>Actual annual installations and training sessions for Phase #3 are unknown. Annual installations and training sessions are estimated. Bidders "Unit Bid Price" per central and district office location under this phase must be the final unit cost per installation and training session per office location charged to OEHS under this contract whether one or more than one is provided.

<sup>2</sup>Bidders must complete the Unit Bid Price and Total Bid for each Phase deliverable (separate bids per central and district office location as indicated under Phase #3).

Bidders must complete, sign, and date the vendor section below:

Vendor Name: CDP, Inc. Phone: 800-888-6035  
Contact Person: Mike Peth Fax: 630-783-8841  
(Please Print)  
Contact Person Email: mpeth@cdpehs.com  
Authorized Vendor Representative: Mike Peth  
(Please Print)  
Authorized Vendor Signature:  Date: September 26, 2011

**IMPORTANT: BIDDERS WILL NOT ALTER, MODIFY, OR ADD INFORMATION TO THIS BID PRICE SHEET**

RFQ No. FHS12035

STATE OF WEST VIRGINIA  
Purchasing Division

**PURCHASING AFFIDAVIT**

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

**DEFINITIONS:**

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

**EXCEPTION:** The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

Under penalty of law for false swearing (*West Virginia Code* §61-5-3), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

**WITNESS THE FOLLOWING SIGNATURE**

Vendor's Name: CDP, Inc.

Authorized Signature: *[Signature]* Date: 9-26-11

State of ILLINOIS

County of COOK, to-wit:

Taken, subscribed, and sworn to before me this 26 day of September, 2011.

My Commission expires 8/19/13, 20    .

AFFIX SEAL HERE

NOTARY PUBLIC *[Signature]*





State of West Virginia  
 Department of Administration  
 Purchasing Division  
 2019 Washington Street East  
 Post Office Box 50130  
 Charleston, WV 25305-0130

# Request for Quotation

RFQ NUMBER  
**EHS12035**

PAGE  
**1**

ADDRESS CORRESPONDENCE TO ATTENTION OF:  
**ROBERTA WAGNER**  
**304-558-0067**

RFQ COPY

TYPE NAME/ADDRESS HERE  
**CDP, Inc.**  
**1408 Joliet Road**  
**Romeoville, IL 60446**

SHIP TO

**HEALTH AND HUMAN RESOURCES**  
**BPH ENVIRO HLTH SERVICES**  
**350 CAPITOL STREET, ROOM 313**  
**CHARLESTON, WV**  
**25301-1757 304-558-8582**

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
09/22/2011				

BID OPENING DATE: **09/29/2011** BID OPENING TIME **01:30PM**

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>ADDENDUM NO. 3</p> <p>1. QUESTIONS AND ANSWERS ARE ATTACHED.</p> <p>2. ADDENDUM ACKNOWLEDGEMENT IS ATTACHED. THIS DOCUMENT SHOULD BE SIGNED AND RETURNED WITH YOUR BID. FAILURE TO SIGN AND RETURN MAY RESULT IN DISQUALIFICATION OF YOUR BID.</p> <p>EXHIBIT 10</p> <p style="text-align: center;">REQUISITION NO.: EHS12035</p> <p>ADDENDUM ACKNOWLEDGEMENT</p> <p>I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.</p> <p>ADDENDUM NO. 'S:</p> <p>NO. 1 ..... X</p> <p>NO. 2 ..... X</p> <p>NO. 3 ..... X</p> <p>NO. 4 .....</p> <p>NO. 5 .....</p> <p>I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>M. H. K.</i>	TELEPHONE 800-888-6035	DATE 9-26-11
TITLE Director	FEIN 36-3022123	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



State of West Virginia  
 Department of Administration  
 Purchasing Division  
 2019 Washington Street East  
 Post Office Box 50130  
 Charleston, WV 25305-0130

# Request for Quotation

RFQ NUMBER  
 EHS12035

PAGE  
 2

ADDRESS CORRESPONDENCE TO ATTENTION OF:  
 ROBERTA WAGNER  
 304-558-0067

RFQ COPY

TYPE NAME/ADDRESS HERE  
 CDP, Inc.  
 1408 Joliet Road  
 Romeoville, IL 60446

SHIP TO

HEALTH AND HUMAN RESOURCES  
 BPH ENVIRO HLTH SERVICES  
 350 CAPITOL STREET, ROOM 313  
 CHARLESTON, WV  
 25301-1757 304-558-8582

DATE PRINTED 09/22/2011	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
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BID OPENING DATE: 09/29/2011 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS.            VENDOR MUST CLEARLY UNDERSTAND THAT ANY VERBAL REPRESENTATION MADE OR ASSUMED TO BE MADE DURING ANY ORAL DISCUSSION HELD BETWEEN VENDOR'S REPRESENTATIVES AND ANY STATE PERSONNEL IS NOT BINDING. ONLY THE INFORMATION ISSUED IN WRITING AND ADDED TO THE SPECIFICATIONS BY AN OFFICIAL ADDENDUM IS BINDING.</p> <p style="text-align: center;">             .....            SIGNATURE            CDP, Inc            .....            COMPANY            September 26, 2011            .....            DATE         </p> <p>NOTE: THIS ADDENDUM ACKNOWLEDGEMENT SHOULD BE SUBMITTED WITH THE BID.            REV. 09/21/2009</p> <p style="text-align: center;">END OF ADDENDUM NO. 2 *</p> <p style="text-align: center;">*although it states NO .2 above, this page was really the 3rd page of addendum NO. 3</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS			
SIGNATURE 	TELEPHONE 800-888-6035	DATE 9-26-11	
TITLE Director	FEIN 36-3022123	ADDRESS CHANGES TO BE NOTED ABOVE	

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

**Due to the required structure of the pricing forms, it is important for CDP to clarify our pricing:**

Month 1	\$125,000 to complete phase 1
Months 2-11	\$50,000 to complete phase 2
Month 12	\$6,000 to complete part one of phase 3 – trainings & Installations
Months 13-24	\$52,800 users fees for first (of phase 3) of three years
Month 24	\$6,000 to complete part two of phase 3 – trainings & Installations
Months 25-36	\$100,800 users fees for second year (of phase 3) of three years of installation PLUS continuation of support and maintenance of the first year's installations.
Month 36	\$6,000 to complete part three of phase 3 – trainings & Installations
Months 37-48	\$149,600 users fees for third year (of phase 3) of three years of installation PLUS continuation of support and maintenance of the first and second year's installations.

Total bid price of \$496,200 includes all three phases plus 36 months of service (total of 48 months).

If we have misinterpreted these pricing forms and/or your intent, we apologize and we would be glad to discuss at length a way to bring the two in-line.



Enterprise Health Systems



September 26, 2011

Ms. Roberta Wagner  
Department of Administration  
Purchasing Division  
2019 Washington Street, East  
Charleston, WV 25311

RE: RFQ EHS12035 - Environmental Health Data System

This document provides a response to the above-referenced solicitation request. The document will: 1) describe our solution and answers to the functional requirements of Web Based Environmental Health Data System, 2) provide information on our solid qualifications and experience in Public Health – specifically Environmental Health, 3) provide required pricing and 4) provide assurance of our capability to meet all contractual requirements.

CDP's Environmental Health Data System is a distributed, secure, web-based system that will provide access to all environmental data that are collected by your department. CDP's Environmental Health solution is a modifiable-off-the-shelf, automated surveillance and environmental reporting system.

The primary feature of CDP's Environmental Health Solution is its capability to provide access to a variety of widely dispersed environmental data. Various levels of access will be provided to users depending on their job duties and supervisory responsibilities. CDP's Solution will also provide a toolset for data analysis, reporting, and monitoring. It will provide important security and protection for sensitive or critical data and systems.

Key benefits of CDP's Environmental Health Solution include the capability to: 1) provide timely information to all users, 2) allow broad analysis across geographic boundaries, 3) increase the efficiency of the mobile Environmental Health staff through the utilization of field applications that provide history, data capture, computer readable & minable data {on or off-line} to our comprehensive web-based Enterprise Environmental Health {Inspection, Scheduling & Reporting} Data System, 4) promote interoperable systems via compliance with standards, 5) increase environmental public health capacity, 6) provide the means to enhance and improve data, and 7) provide extensive reporting through different means.

CDP has reviewed the above-referenced RFQ and subsequent addendums thoroughly and fully understands its requirements as well as all OEHS' answers to vendor's questions which provided additional clarification. CDP is willing and able to perform the services outlined in the RFQ and each addendum and comply with all its deliverables



Enterprise Health Systems



and requirements as outlined on pages 12-37. Furthermore, CDP assumes that all of these requirements are fully representative of all data elements and core functionality that must be in the final customized system. The CDP team looks forward to the opportunity of working with the State of West Virginia on such an important project.

CDP has been developing, operating, and supporting software and computer solutions to public health agencies for 30 years. Currently, we have clients in six states, including a statewide contract with the Commonwealth of Kentucky and a nation-wide environmental health system contract with Indian Health Services. **In addition, CDP and our eWIC partner FIS were recently awarded the West Virginia WIC EBT contract.**

In line with current trends and the overall public acceptance and growing expectation of doing business and receiving services electronically, CDP will continue its initiatives to continue enhancing our solutions and functionality to meet the growing needs of our public health client base all the while focused on three important pieces; security, portability and interoperability.

Our action plan outlines the critical activities that will put our Public Health clients on a course for success in Information Technology. We believe technology can help improve key services for our constituents. Our solutions are scalable and can grow along with and ahead of our client's needs. In addition, our software solution allows for easy customizations and configuration changes.

In summary, our view is that the role of software is to deliver a service and that by shifting the focus to describing and delivering that service rather than providing software, we can move away from the constraints imposed by the 'traditional' models of software construction, use and ownership. Hence our service-based model is one in which one or more services are configured to meet a specific set of requirements at a point in time, executed and disengaged; a vision of instant service that is consistent with the widely accepted definition. Although the process may be tied to a physical product, the performance is essentially intangible and does not normally result in ownership of any of the factors of production.

Our success is based on a fundamental set of beliefs: since our clients serve the public we must uphold the highest level of support, value, and ethics. Evidence of this success can be found with our longevity of service, our reputation, and our references.

Sincerely,

A handwritten signature in blue ink that reads 'Michael Peth'.

Michael Peth



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CDP proposes a system that substantially fulfills all the requirements as outlined in this RFQ as well as providing the enhanced functionality desired by The State of West Virginia, Department of Health and Human Resources (DHHR), Bureau for Public Health (BPH), Office of Environmental Health Services (OEHS), Public Health Sanitation Division (PHSD).

CDP has reviewed the above-referenced RFQ and subsequent addendums thoroughly and fully understands its requirements as well as all OEHS' answers to vendor's questions which provided additional clarification. CDP is willing and able to perform the services outlined in the RFQ and each addendum and comply with all its deliverables and requirements as outlined on pages 12-37. Furthermore, CDP assumes that all of these requirements are fully representative of all data elements and core functionality that must be in the final customized system.

### **Executive Summary**

CDP has implemented statewide, district and county-level environmental health data systems in NC, KY, UT, ID, & IL and is uniquely qualified to understand and fulfill the requirements of this RFQ. In addition, CDP is in the process of implementing our environmental health application nation-wide for the Indian Health Services. CDP has been providing Environmental Health Systems for 28 years.

In addition to environmental health, CDP has been, and continues to be involved in the development and hosting of other health-related systems including Patient Services, Immunization Tracking and WIC, in the States of Kentucky, North Carolina, Idaho, Illinois and Utah. The functionality of these systems include, but not limited to; case management, billing, tracking, monitoring, all within a variety of state & local rural public health departments. CDP and our eWIC partner FIS have been recently awarded the West Virginia WIC EBT contract.

CDP has implemented its public health systems in over 400 locations nationwide, supporting over 5000 users in five states. CDP currently has approximately over 150,000 active establishments and approximately 4.5M inspections records stored in our database that are specifically related to Environmental Health. The State of Kentucky uses our CDP Environmental Health programs statewide. CDP also has clients in Utah, Idaho, North Carolina, and Illinois.

CDP will bring the experience coupled with the human and technological resources necessary to ensure the on-time completion of the project. We will utilize standard methodologies, best professional practices and industry standard tools to provide a system that meets and exceeds expectations.

For 30 years, CDP has developed customized, enterprise health software for our customers. This experience is complemented by a full-range of in-house services; including hardware and peripherals assembly, hardware system assembly, configuration and testing, on-site installation, user training, and on-going software and hardware support. CDP will be your single point of contact for your environmental health program operations, making your transition to a new system go smoothly.

CDP, Inc. is a Sub-S corporation based in Romeoville, Illinois. CDP has a large facility in Frankfort, KY and satellite offices in Burlington, NC, Benton, KY, Salt Lake City, UT, and Tucson, AZ.

CDP is a leading provider of comprehensive data management tools and platforms that assist public health reporting while aiding data accuracy and financial management. CDP provides the public health community with public health software and Information Technology solutions in an ASP model, making CDP a leader as a Public Health Software as a Service (SaaS) provider.

Originally founded in 1963 to provide programming and computer support services to private businesses and governmental organizations, CDP broadened its scope in 1981 to include custom software solutions for the public healthcare industry. Not only are we one of only a handful of companies worldwide that focus on the public health market, our 30 years' experience in environmental health and our full-range of support services are unprecedented in the industry. We are proud of our customer-service focus; most of our 105 employees are directly involved in providing support to our users, typically interacting daily with customer sites.

CDP has never filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors. CDP has no pending Securities and Exchange Commission investigations.

Neither the proposer nor any of its employees have any conflict of interests related to responding to this RFQ.

CDP's primary engagement contact is:

Mike Peth  
Director, Sales & Marketing  
O 800.888.6035  
C 708.212.0984  
mpeth@cdpehs.com

#### **Understanding of Project / Scope of Services / Assumptions**

CDP understands:

- The importance of environmental health to the public.
- Everyone is being asked to do more with less.
- That the OEHS and local staff need to focus on environmental health-related issues and not technology concerns.
- What it takes to design, develop, implement, host, maintain and support environmental health systems at the county, district and state levels.

CDP is pleased to respond to OEHS' RFQ for an Environmental Health Data System to provide an environmental health data system that supports inspections, investigations, reporting, billing, and staff time management for OEHS' PHSD as well as local health departments throughout the state of West Virginia.

During Phase #1 of the project, CDP will provide OEHS with our Base EH System as described on page 13 of the RFQ for review and help OEHS prepare for Phase #2.

During Phase #2, CDP will work closely with OEHS staff to create detailed specifications over the course of a minimum of one full day and a maximum of five full days at OEHS' office; create an agreeable project plan; and then will execute the plan and customize the Base EH System to meet all of the requirements mentioned in this RFQ within the agreeable timeframe.

During Phase #3 CDP will schedule and provide on-site installation and training at mutually agreeable dates/times at the named district offices.

CDP will implement and transfer data from OEHS' to CDP in consultation with OEHS. CDP will perform data system management; provide enhancements, error resolution, and routine maintenance to our Customizable-Commercial-off-the-Shelf Inspection Management System (CDPims) through the life of the contract.

CDPims is a web-based, user-friendly application that is uniquely suited to meet OEHS' requirements for the following services:

- Web based computer services to support and manage regulatory activities.
- Allow for sharing of data captured through inputs to/by other OEHS and/or outside applications.
- Provide a high level of quality control mechanism for the facility data collected.
- Provide data and applications support to the overall mission of OEHS.
- Provide management/decision tools at the county, district and state levels to make use of data input by the field.
- Better integrated data with other applications within OEHS.
- Allow for growth and modification.
- Provide the ability to track activities and all service information.
- Complete data conversion, training, and acceptance testing prior to commencement of the services.
- Improve the standardization of data elements and data collection methods.
- Provide assessment of performance leading to increased efficiency in program operations, guide program policy and training efforts.
- Improve cross-jurisdictional cooperation.

CDP also understand that the goals of OEHS are:

- To use information technology to apply performance management and quality improvement concepts in environmental health programs statewide.
- Improve effectiveness and efficiency of environmental health services and prevent disease and improve health outcomes.
- To use appropriate technology to ensure the highest quality system, accessible by all Environmental Health staff.
- To ensure the accessibility of complete and accurate data within several integrated modules tracking several different program areas.
- To provide staff productivity savings through the use of browser technologies and the reengineering of current processes that support business functions.
- To provide a rapid development environment to respond to new business requirements when new rules, legislation, operating procedures or other directives imposed upon the Department are executed after contract execution.
- To provide workflow management & tracking.
- To provide a robust standard reporting system & ad hoc reporting functions.
- To provide enhanced capability to interface with other applications.

CDP has the experience to help you achieve your goal to strengthen your electronic data base of your environmental health services utilizing web-based technology as well as our integrated field application capable of off-line use.

CDP has the experience to help you achieve your goal to strengthen your electronic data base of your environmental health services utilizing web-based technology as well as integrating field applications capable of off-line use.

CDP offers a reliable, proven information management system for federal, state & local health departments. The user connects to our system via a web browser, then enters and/or receives data; the data is actually "warehoused" at one of CDP's two data centers. To the user, the data exchanges take place just as if the server was sitting next to them. Data is entered or received in a "real-time" mode; as data is entered, the appropriate files are updated and reports become available for viewing and/or printing on local printers.

The early steps in developing an information system lay the foundation for its long-term success and utility. CDP uses a proven structured methodology to design information systems that meet the needs of the end users. Our design approach proceeds from needs to solutions—in other words, applications must drive design. Before a system design is proposed, we work closely with the client to determine the system requirements and priorities, as well as a strategy for initial development and future expansion. After these functional parameters are defined, we then prepare an implementation plan that describes in detail the steps and processes that will lead to successful implementation on time, and within budget.

Our experience coupled with the priceless user knowledge we have garnered working with our long list of public health customers throughout the country provides CDP with a unique perspective regarding the public health community's (EH, Clinic, WIC, EBT, and HHC) need for data capture, data management and external hosting (when required). No other vendor provides this level of comprehensiveness!

Our field application, CDPmobile, will make field inspections for OEHS' inspectors more efficient and productive while increasing the accuracy of the data collected.

### **Proposed Application Software and Computing Environment**

CDP has developed its Web-based, table driven applications in .NET using an Oracle relational database.

.NET technologies use Web services to help enhance the computing experience with highly integrated communications and information. Because .NET includes the core technologies for building Web services, it benefits everyone: individual users, organizations, and developers.

.NET benefits organizations by helping them get the most out of their existing technology investments while creating new ways to implement powerful, cost-effective information technology that will meet future needs. .NET technologies and Web services can be used to integrate even the most disparate computing environments.

CDP has utilized web services for over eight years. With built in support for web service interfaces and ASP.NET, utilizing the .NET framework dramatically speeds up the process of numerous aspects of development. CDP has incorporated web services in almost all of our applications:

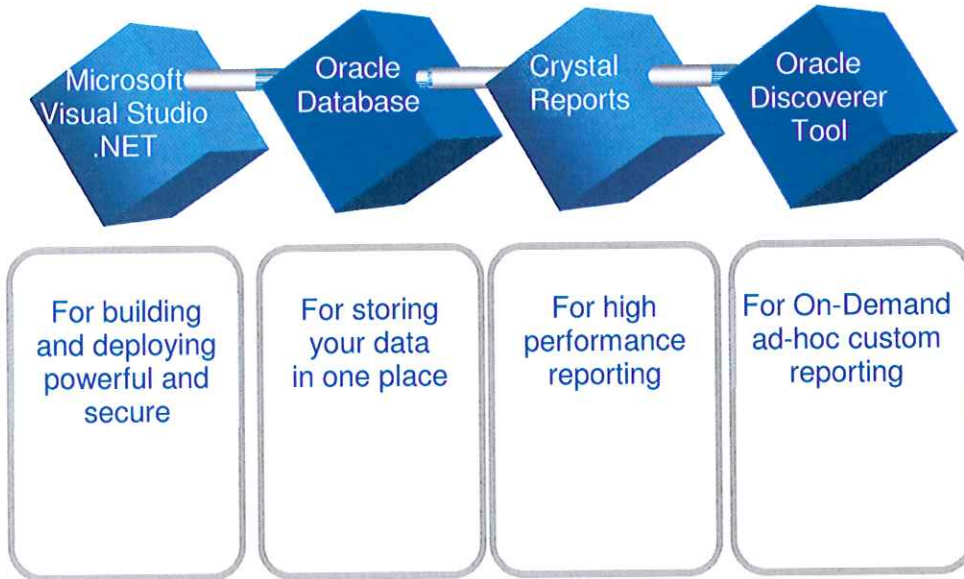
NET benefits individuals by helping provide a more personal and integrated computing experience. .NET-enabled computing is centered on the user – not on the features of the software or hardware. The user's experience becomes very customizable and provides integrated data and customized interactions that work well with a wide range of computing hardware, such as TabletPCs, laptops, and other devices. The .NET-based experience enhances the mobile computing experience so users can get their information regardless of their location.

Oracle Database – With unmatched and proven technology, CDP employs Oracle 10g Enterprise Edition as its data management software. Oracle 10g high availability features are designed to protect from the causes of downtime. CDP has leveraged all the benefits of Oracle for a flexible, reliable, secure data management platform.

Oracle provides the world's most complete, open, and integrated business software and hardware systems to more than 370,000 customers—including 100 of the Fortune 100—that represent a variety of sizes and industries in more than 145 countries around the globe. Leading State & Local Agencies rely on Oracle Applications. Oracle (NASDAQ: ORCL) is the world's most complete, open, and integrated business software and hardware systems company.

With Oracle development tools for .NET, developers can create enterprise-wide solutions that span disparate systems. Oracle integrates with Visual Studio .NET using tools such as Oracle Data Provider for .NET, Oracle Developer Tools for Visual Studio .NET, and Oracle Database Extensions for .NET. The result is improved developer productivity in the heterogeneous environment.

Tools used to build and deploy our systems



With Oracle development tools for .NET, developers can create enterprise-wide solutions that span disparate systems. Oracle integrates with Visual Studio .NET using tools such as Oracle Data Provider for .NET, Oracle Developer Tools for Visual Studio .NET, and Oracle Database Extensions for .NET. The result is improved developer productivity in the heterogeneous environment. In addition, CDP uses Web Services in several instances and takes full advantage of SOAP, XML and ADO.NET

Since this is a hosted solution CDP is the administrator of the system.

- Server Architecture
  - CDP Systems are hosted at CDP’s Kentucky datacenter using an Intel based server architecture. Live backup servers are available for each system and in the event of a server failure the system will fail-over to a backup system at the Kentucky datacenter. In the event of a total site disaster for the Kentucky datacenter all systems will fail-over to the Romeoville, Illinois datacenter.
  - CDP Systems hosted architecture consists of industry standard server operating systems, servers, and development standards to produce web based applications that are compatible with most operating environments.
  - All servers are equipped with managed antivirus software that provides a real time scan engine. This will scan all incoming and outgoing files.
  - We send daily full backups to an offsite storage facility, which are rotated through on a weekly basis

- CDP has the capability to allow external or shared connections using virtual private networks (VPNs). We are capable of doing a site to site, or client to site connections.
- Client Architecture / Platform
  - Most applications in the system are “zero footprint” with a few exceptions
    - Reporting – requires a security acknowledgement of embedded Crystal Reports ActiveX components
      - Viewer component is 3MB
      - Print component is 1.3MB
      - Export component is 154KB
    - Document Management
      - Microsoft Click-Once application that is launched from the browser
      - Entire application is embedded in a web link and requires the users(non-administrative) permission to execute
      - Document Management client is 8.1MB
- Internet Explorer is not a requirement, only a preference. Our applications render correctly in multiple browsers (Firefox, Google Chrome, Safari) other than IE and will function properly. We prefer IE because it enables client-side validation along with server-side validation. Other browsers support only server-side validation. However, all client-side validation done within our applications is replicated as server-side validation as well.

Benefits of this Approach:

- Zero-based footprint
- Use of standard protocols
- Increased levels of program security
- Data modification tracking
- Integrated table design allowing for increased field validation
- Immediate error validation and notification
- Ability to interface to third party web services
- On-demand reporting
- Ad hoc queries using real time data

The web-based environmental health Inspection Management System includes, but is not limited to, the following modules:

- Complaints/Requests for Service
- Facility / Property Master File Maintenance
- Inspection Processing/Tracking
- Cash/Accounts Receivable
- Billing/Annual Renewals
- Permit Processing
- Statistical Reporting
- Field Activity Processing

Benefits Include:

- Comprehensive public health reporting
- Improved surveillance
- Improved financial management

Modifications will be treated in the same manner as the initial requirements. CDP will use a variety of techniques to obtain the background information and business objectives related to any changes that are requested after implementation. These will include verbal requests, digital or hard copy survey forms, individual

interviews with key personnel, and focus sessions. We normally request that changes be communicated to CDP by a designated individual to streamline the revision process.

CDP will request that OEHS provide CDP with a variety of background information regarding the proposed changes. This information will give CDP development staff an understanding of the Department's program activities that necessitate changes to the program. CDP will conduct individual or small group interviews to follow up on or clarify the information provided in the modification documents.

CDP will then prepare a Requirement Modification Document, approved by the client, to confirm the change requests.

Once CDP receives the modification document, we will make the changes in the agreed upon time frame. One of the many benefits of our SaaS (software as a service) model enables us to implement these changes quickly to all of the users concurrently. This quick implementation includes both our CDPims as well as our field application - CDPmobile.

New version introductions and/or enhancements to the solution will be provided for at no cost.

#### **Functionality Descriptions by Module**

CDPims (Inspection Management System) is a completely integrated web-based, database-centered, fully .NET compliant Environmental Health application.

In addition, CDPims accommodates seamless integration with CDPmobile, used by the mobile workforce to eliminate paperwork in the field utilizing TabletPCs or laptops.

The primary feature of CDP's Environmental Health Solution is its capability to provide access to a variety of widely dispersed environmental data. Various levels of access will be provided to users depending on their job duties and supervisory responsibilities. CDP's Solution will also provide a toolset for data analysis, reporting, and monitoring. It will provide important security and protection for sensitive or critical data and systems.

CDPims is a role-based secured system thus providing the users access to the System at various levels of security or data access based upon the characteristics of the data, and/or the user's role.

CDP will either meet and/or exceed all requested specifications for the environmental health software system detailed including, but not limited to:

- Tables – ability to add/edit/delete support table entries (program area, establishment type, etc.) as well as system tables (users, roles, etc.)
- Establishments – single database table containing all program areas with renewal applications and permit functionality.
- Inspection/Activities/Scheduling – ability to track inspections by establishments, complaints as well as capturing time for daily activity reports.
- Request for Service / Complaint Tracking - single database for all program areas
- Permit Processing.
- Analysis.
- GIS/GPS Interface.
- Accounts Receivable/Billing.
- Ad Hoc and Standard Reports.
- Data Warehouse.
- Role-based security allowing access to all programs, pages, menus and buttons.



- User sign-on security allowing access to county, and/or district and/or state level information.
- Single sign-on to all CDP web based environmental applications.
- Database tables include:
  - Property
  - Application
  - Evaluations
  - Profile (test hole)
  - Horizon (soil layers)
  - Permits
  - Inspections
- Auditing function to track what changes were made, when and by whom.
- Expanded comment areas.
- Ability to track all events (new installations, repairs, complaints, water samples etc...) over the years for a single property.
- Ability to do extensive reporting on all data elements.
- Drop-down calendars and list boxes limit user to only valid selection options.
- Allows capture of GPS coordinates for property, test holes, system placement, etc... with interface to GIS.
- On-demand viewing/printing of application, soil evaluations, permit and inspection forms.
- Direct interface & synchronization with CDPmobile for in the field use for complete data capture including GPS unit interface.
- Property searches by: district, county, street, city, zip code, subdivision, owner and/or applicant.
- Filter to show applications by status (new, pending, completed, etc...).
- Allows capturing detailed soil site evaluation data including information regarding:
- Automatic time and activity capture.

### Inspections/Activities

- Can be entered for plan review activities, facility inspections, complaint investigations, as well as daily activity entries.
- Violation tables are built by program area. Violation records store the weight of the violation used in the score calculation.
- Inspections can be entered into the system from various input systems.
- On-screen error notification
- Duplicate checking to eliminate duplicate violations.
- Score/grade is automatically calculated based on indicted violations.
- Complaint inspections/investigations linked to facilities.
- Inspections searched by facility, complaint etc.
- Inspections searched by inspector in various ways: date range, county, programs etc.
- Automatically generate next inspection dates based on interval and/or violations.
- Generate form letters and corrective action plans based on indicated violations.
- Allows for the entry of a Department defined reason code.
- Allows for the override of inspector numbers on the entry screen.
- Allows for the capture of "general" comments for an inspection.
- Allows for the capture of either canned comments (from a predefined pick list) or the inspector's free form written comments.
- Inspection views are displayed as a facsimile of the inspection form.
- Inspectors have the ability to create an on-demand "Inspection Roster" (places to be inspected). The report will allow the inspector to limit selection to the facilities to a specific date range, county, and/or program area.

### **Inspection Scheduling**

Inspectors have the ability to create an on-demand "Inspection Roster" (places to be inspected). The report will allow the inspector to limit selection to the facilities to a specific date range, county, and/or program area.

### **Service Requests/Nuisance/Complaint Management**

- Handles any request for a service the Department may receive as well as citizen's complaints.
- Support the launch of a food borne illness investigation process whereby data can be collected and exported.
- Request for Service/Complaints can be logged and tracked through resolution.
- Tracks complaints by program area.
- Ability to assign inspectors manually or automatically.
- Ability to schedule inspections/investigation & track next inspection/investigation dates.
- Captures inspection/infestation results and automatically posts to inspection database.
- Allows for resolving requests.
- Also includes companion animal bite and food borne illness modules.
- Ability to interface with the accounts receivables module.
- Creates worksheet for inspector to use for inspection/investigations.
- Duplicate checking to avoid multiple instances of complaints.
- CDP accepts, assigns, and tracks a wide range of complaints on the basis of geographic data, discipline, and source.
- CDP associates complaints in categories.
- CDP enables electronic filing of complaints.
- CDP supports staff assignment to process complaints across internal functional areas.

### **Activity Tracking**

The primary function of the Activity Tracking module of CDPims is to accept web-based time entry from all users within the department for all activities on an hourly/minute basis. It provides for each program code, program description, and the total time spent.

The system will track employee activity by any, or all, of the following:

- Facility/property by number
- Activity and its appropriate code
- Time spent

This data will be stored in an Oracle database to enable real-time data entry, access, and updates as well as real-time reporting such as a report that will output each program code and the number of hours that have been booked against that program code by all employees in any specified time period.

In addition, this module provides functionality to do the following.

- Admin tab:
  - Show program groups & types
  - Show/edit activity codes
- Activity Log tab
  - View activity by sanitarian/user
  - Add activity
- Activity History tab
  - Show all activity history, by area, program type, user, date range etc
- Selections can be exported to the following formats: PDF, Word, and Excel

## Public Website for inspection Viewing

CDP will provide a public web site allowing public access to, but not limited to, facility / inspection information.

## CDP's web based Document Management System – CDPdms

CDPdms is an efficient tool for storing, manipulating, and maintaining electronic documents and is built to seamlessly integrate with CDPims. Its features include document scanning, document search and image manipulation, all supported and protected by critical, role-based security and storage features.

- Instantly provides documents to multiple users via a central repository.
- Significantly increases constituent service by improving access to documents.
- Efficiently meets the most current regulations and reporting standards.
- Mitigates the impact of agency turnover and staffing changes.
- Connects silos of data within and between agencies.

## Program Features

- Use of TWAIN-compliant scanners and input capture devices.
- Import any native file.
- Export files to a local file system.
- Store files via CDPdms.
- Convert image files to JPEG, GIF, TIFF, PNG, or BMP formats.
- Combine multiple image files into one multi-page TIFF or PDF file.
- View or Scan from the web using ClickOnce.
- Search by document type.
- Search by document date.
- Search by keywords or notes.
- Easy indexing of single files during scanning.
- Multiple images can be scanned at once and indexed as needed.
- Advanced indexing of multiple files at once for large documents.
- Simple menu choices with help for each menu option.
- Right-click options allow indexing of single documents during scanning or when updating existing documents.
- Set It and Forget It —the CDPdms Quick Scan feature allows users to configure their scanner once and use the same settings for all documents.
- Full-size scanners can be utilized.
- The only restriction is that the scanner is TWAIN compliant and that the client site's bandwidth is large enough to handle the file transfer.

## Field Application

CDP has the experience to help you achieve your goal to strengthen your electronic data base of your environmental health services utilizing web-based technology as well as integrated field applications capable of off-line use.

Our field application (CDPmobile) will make field inspections for inspectors more efficient and productive. Through the use of Laptops or Tablet PCs, all aspects of operations in the field can be integrated with CDP's Inspection Management System database, including permitting, inspections, complaints, and more.

## CDPmobile

CDPmobile streamlines field inspections and reduces paperwork by transferring digital ink forms and digital handwriting directly to the CDPims. Through the use of Tablet PCs all aspects of operations in the field can be integrated with CDP's Inspection Management System database, including permitting, inspections, and complaints.

CDPmobile is an application for the communication of forms-based data for our enterprise users featuring flexible forms design, highly accurate handwriting data capture & recognition, robust communication and synchronization with our web based .NET, database-centered environmental health application (CDPims), handwriting interpretation, verification and data validation.

CDPmobile was developed to work off-line to conveniently view inspection history, access demographics, and complete inspections while not connected to the internet out in the field. Later, once connected to the internet, synchronization of the field data to our database takes place -- one of the many benefits of developing with .NET technology. If desired (but not required), our users can utilize aircards with their TabletPCs in the field to connect directly to our database.

The flexibility provided by our optional CDPmobile can be found in each of the key processes in forms-based data collection: Electronic Forms Design/Replication, Data Capture, real-time Data Validation, and Information Communication utilizing custom built web services to synchronize data from the field to the servers. Productivity gains for end users are substantial while maintaining a high level of data quality. Additionally, CDPmobile eliminates the dual & triple entry of information often found currently throughout public health.

CDPmobile is a Digital Ink Application platform used to build digital writing applications and specialized products for our customers using Tablet PCs and Laptops. It is particularly useful when there is a level of mobility required in capturing data and/or when there is a need for handwriting some of your organization's data input. This format promotes user familiarity with current forms and a shallow learning curve. CDP is able to replicate any forms required regardless of their purpose.

**Benefits of CDPmobile include:**

- Flexible forms design
- Handwriting interpretation/recognition
- Verification
- Data validation
- Communication of forms-based data for our enterprise users
- Robust communication with our back-end rich database systems
- Eliminate paper forms and the re-entry of data
- Collect information in real time or offline
- Comprehensive data quality processes
- Electronic Audit Trails
- Security of a paper record
- Audio and visual feedback
- Built-In business rules
- Rich content
- Wireless transmission
- Integrated voice/sound recording
- Ability to draw on the imported photo
- Rapid data transfer
- Minimizes retraining
- Web-based storage, access & capabilities

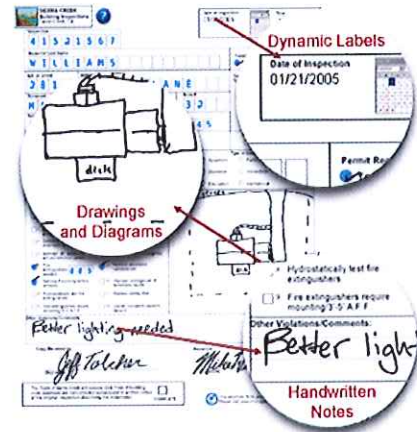
With the implementation of CDPmobile your organization will see:

- Increased Efficiency
- Increased Accuracy
- Integration of Data with CDP's other Systems
- Automated Business Procedures

A CDPmobile form is an electronic representation of a printed form, including the printed data elements on the page as well as definitions for the behavior of the form in CDPmobile.

Forms in the CDP system are composed of a variety of elements. Here is a list of some of the ways data can be captured on a form:

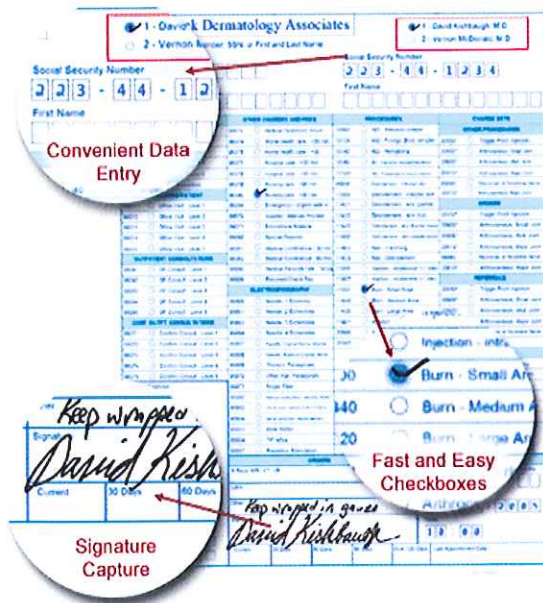
- checkboxes
- handwriting text & number boxes
- freeform entry fields
- hotspots
- bubble groups
- pre-fill from data stored on local access database



These are all pen-on-paper elements designed to be filled in with handwritten ink. The CDPmobile form template (built with the Forms Designer) defines the dimensions of these elements, their locations on the printed page, and how to represent and store the data contained within.

The following elements are electronic only; they appear in CDPmobile's on-screen interface and do not represent objects actually on the printed form:

- Picklists
- Hidden fields
- GPS Data
- Barcodes
- Photos



The CDPmobile Designer is used to build the forms used by the CDPmobile client. The designer builds a printable version of the form and adds feedback, business rules, and datapaths.

**Business Rules** Business rules may be added to a form to enforce quality data collection. Such rules may be used to flag potential errors or even prevent the user from submitting bad data. CDPmobile's business rules are defined using Boolean algebra, which is capable of expressing highly complex interrelationships among form fields. These rules can also be used to assign values to fields based on the values of other fields. And for the ultimate in flexibility, a full API is provided so that business rules can actually trigger code from extension modules.

**Feedback** The form designer can specify real-time feedback during data collection sessions. This feedback can be visual or audible (any arbitrary WAV file can be added to a form for playback at specific times). The feedback may

occur when data is entered (for example, CDPmobile can "speak" the value of a checkbox that is hit) or when business rules are violated.

**Datapaths:** A CDPmobile datapath controls the export of data to the Oracle database.

CDPmobile provides everything that is needed to complete the other key steps in mobile data capture:

- Pre-fill
- Capture
- Verify and Validate
- Communicate

**Pre-fill:** Pre-fill your forms with data you already have.

Data from the local access database (utilized for off-line use) loaded on the mobile unit synchronizes data with our central Oracle database and used as pre-fill information into a form. This reduces the amount of information needed for capture, reduces possible errors introduced without pre-fill data, and allows captured data to be linked back to the original record source, if needed.

**Capture:** Capture new data using a Tablet PC, Windows PC, or Digital Pen.

CDPmobile on a Tablet PC will convert handwriting into machine readable text as you write. Drawings, diagrams, and a number of other data sources may also be captured if needed (images, audio, barcodes, gps, attachments of any files, etc).

On a Windows XP PC or above, CDPmobile provides a keyboard and mouse entry interface for capturing data.

**Verify and Validate:** Verify the handwriting recognition results and validate data relationships (date / time evaluation, business rules, etc.) on your form.

On the Tablet PC, verification and validation checks are performed as the user is collecting data in real-time, at the 'scene' of data collection.

**Communicate:** Communicate and share your data with existing enterprise systems.

Data will be exported from the CDPmobile client to the centralized CDPmobile Server and then to our central Oracle database.

**CDP's Complete Hosting Solution Includes:**

- Software/Communications in one turnkey operation
- Complete Disaster Recovery
- Data back-up
- Targeted standardization of critical data and functions
- Efficiency in application development and integration
- Greater agility by enabling faster application development and acquisition
- Reporting
- Storage
- On-line accessibility
- Operational personnel
- Help desk
- Documentation
- Training
- Future upgrades of all hardware and associated disaster recovery
- On-going license fees

- Software upgrades
- Annual user group meetings
- Allocated facility & operational costs
- Prior & future allocated research & development

### System Features

Integration – Our .Net developed web based applications utilize web services to integrate with other third party vendors. CDP's web based systems are built on the foundation of an Oracle database. Exporting of data from this database to formats such as MSWORD, MSEXCEL, and PDF formats are provided with each application. Custom integration is achieved through the utilization of web services, with extracted data being migrated over secure lines to other 3<sup>rd</sup> party software products. This custom integration is done on an as-needed basis and has been accomplished for many of our current clients.

Data Conversion - 1) All data elements in the current system will be matched/mapped to the data elements on CDP'S database. Data elements that do not exist on CDP's database will be reviewed with OEHS personnel. 2) Necessary support tables will be setup. 3) Validity checks and relationship rules will be established. 4) CDP will import the data received from OEHS into CDP's database using commercial data conversion software. The import process will generate audit reports documenting record counts (in/out) as well as any columns/rows that may have been rejected and the reasons why. 5) The audit reports will first be reviewed by CDP personnel and the import process will be repeated until results are satisfactory. Import issues that cannot be resolved by CDP personnel will be discussed with the designated OEHS contact(s).

Security – All CDP's web based applications utilize role-based security. A combination of user type and/or specific application and/or application restrictions can be setup and maintained by each sites Admin user. Application and page restrictions can be used to limit a user's access to certain information completely, or as view only. All CDP's web based applications are run through secured servers and use Secured Socket Layer encoding. CDP uses an SSL encryption based around an AES 256-bit encryption level for web communications.

Single sign-on to all CDP web based environmental applications are utilized. Role-based security allowing access to all programs, pages, menus and buttons. For each user, access can be restricted to certain applications, pages, and even down to a particular control (buttons, certain fields, etc). The department's admin users will have the ability to maintain all other users' privileges.

### User Management -

- CDP's web based systems contain a security/user web application. Access to this application is granted by CDP to Admin or Power users only. This level of user can then maintain user ID's, email addresses, access permissions, passwords and lock-outs. Lower level users will only have access to change their password, or request their password from CDP if forgotten. To obtain a user's password, the user is required to enter their username and email address assigned to the user record. Admin/Power users will also have the rights to reset any user's password. After the initial setup, the management of user records and their related permissions is controlled by the clients Admin/Power users.
- The security application is setup to deny/allow access at four different levels:
  - System (Entire IMS)
  - Application (Establishments, Inspections, A/R, etc.)
  - Page (Add page, edit page, view only page, etc.)
  - Control (Specific buttons/icons that perform coded actions.)
- By breaking out the security to each of these levels, users can be granted access to or restricted from any portion of the system. Example: You may want a user to be able to change an establishment's demographic information but not be allowed to issue a permit. Therefore, the user can have access to the edit establishment page, but will not see the Print Permit button.

- The various levels of security can be applied to any part of the system from data capture to viewing data to reporting.
- Auditing is performed on every table and every column within these tables. CDP's auditing module tracks every column that gets changed with before and after values stored and available for viewing. The auditing module tracks the date and time the change was made, what was changed, and who changed it. This application can have its own roles so as to allow only certain users to view this information. This information is not editable in any way.

**Workflow** - All of CDP's web based applications follow a drill-down workflow based on table relationships. Record selection allows the user to navigate from its parent table to each of its dependencies (child tables.) Navigational buttons are provided across the applications to also allow the user to return to any level of the workflow without having to work back through each individual level. Menu bars are also provided to allow the user navigation in and out of the various applications.

**Web Enablement** – All of CDP's Environmental Health Applications are internet enabled assuring that the data can be accessed on a real-time basis. CDP's applications are accessible from any location with access to the internet. At times, some unexpected results (mostly page formatting) have been encountered when using browsers other than Internet Explorer. Internet Explorer is the recommended browser.

**Reporting Features** – All CDP's web based applications come with a standard set of "fixed" reports that are written in Crystal Reports. Each report can be run at anytime and allows for filter criteria to be entered, such as EHS number. Additionally, CDP utilizes the Oracle DiscovererBI ad-hoc reporting tool produced by Oracle. This tool gives the user access to each database table, and each element within the tables using Oracle Discoverer.

There are no additional costs for the Crystal Report software. The actual reports required by OEHS as listed in the RFQ are included in our quote. In addition, CDP has had great success with Crystal Reports for the purpose of pre-defined reports as well as creating documents such as permits, inspection forms etc.

All ad-hoc reporting utilizes Oracle Discoverer. In addition Discoverer's ad-hoc reporting can be utilized for new canned reports since all of these reports can be saved and/or shared with other users.

Both Crystal and Oracle Discoverer reports can be exported to Excel.

- Query Abilities
  - Pre-Defined Reports Developed in Crystal
    - Reports are created based on current data.
    - CDP utilizes Crystal Reports as its report generation tool.
    - Reports can be created quickly whenever the user requires them.
    - Reports are categorized by module: system, tables, facilities, inspection/activities, accounts receivable, complaints, and certifications.
    - To create a report the user will:
      - Select a category from a drop-down list.
      - Select a report from the drop-down list of available reports for that category.
      - Select any of the pre-defined parameters available for the report (date range, program area, etc).
      - Run the report.
    - Reports can be viewed, printed or exported to a variety of formats (Excel, Word, HTML).
    - Users can only see the data that they have access to.
  - Ad-hoc Reports utilizing Oracle Discoverer



- In those instances where a pre-defined report does not exist, CDP offers the use of an Oracle query tool called Discoverer. Oracle Discoverer is a browser-based application that allows users to create queries and reports without having any knowledge of database functionality. Users merely select the tables and items they wish to query, set any condition or filters, and then run the query. The user can view or print the results of the query or export the results to Excel or HTML files. Once the query is processed the user has a choice of:
  - Exiting without saving the query,
  - Saving the report/query for re-use at a later time or
  - Share the report/query with other users, district, county or state.
- Users can only see the data that they have access to. Queries that are saved for future use will always show current data.
- Create charts & bar graphs.

## Project Management / Quality Assurance

### Project Initiation

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As part of project initiation, CDP will conduct a project kickoff meeting that will establish a shared understanding and expectations of the project. Project Initiation consists of establishing a Project Charter (validates the project's existence and establishes the authority of the Project's Steering Committee team members) and performing Stakeholder Analysis. The outcome of the kickoff meeting will be to address the following:

- Introduce Project Team Members (CDP & Client)
- Exchange contact information and design high-level Communication Plan
- Identify Steering Committee members and assign Steering Committee level of authority
- Review Staffing Management Plan (CDP's Project Team and needs for Client's Staff Resources)
- Review and Discuss Requirements Management Plan (Schedule Specification-Requirements Gathering Sessions)<sup>1</sup>
- Review high-level Project Schedule (Identify calendar constraints)
- Review CDP's Project Management Plan (project management approach)
- Review External Interfaces and those respective stakeholders
- Review Change Management Plan

Project Initiating is exactly *that* – it sets the stage for the project to begin and authorizes the preliminary work effort to prepare for the Project Planning phase.

### Project Planning

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CDP completes a Project Management Plan for every project. The Project Management Plan is a compilation subsidiary Management Plans that are collectively integrated into one cohesive whole through Integration Management. The CDP Project Manager will be responsible for maintaining consistency across all Management Plans.

The Project Management Plan is created by the Project Team in accordance with completing the tasks and activities that will satisfy the project's deliverables. The Project Team consists of both CDP personnel and Client

<sup>1</sup> Depending upon size/complexity of the project, some kickoff meetings may serve as the first round of Specification-Requirements Gathering.

staff: All persons responsible for completing the work, persons that will be affected by the work or others persons of special interest that are identified during the life of the project (subject matter experts).

The narrative descriptions, templates and designs below are the baseline for the Project Management Plan (refined with the tools, techniques and processes used for delivering web-systems that meet the requirements and objectives of Environmental Health). As each management plan within the project is progressively elaborated and decomposed into manageable tasks, the Project Management Plan is updated with the strategies identified and any additional tasks/activities are logged and assigned into the Project Work-Plan.

The Project Management Plan includes the following:

[Scope & Requirements Management Plan](#)

[Project Work-Plan](#)

[Time Management Plan](#)

[Cost Management Plan](#)

[Quality Assurance Plan](#)

[Staffing Management Plan](#)

[Communication Plan](#)

[Risk Management Plan](#)

[Database Conversion Plan](#)

[Configuration Management Plan](#)

[Change Management Plan](#)

[Issue Management Plan](#)

[Deliverables Acceptance Plan](#)

[Operations Management Plan](#)

### ***Scope & Requirements Management Plan (Product & Project Scope Baseline)***

CDP works very closely with the Client to determine the requirements of the project (both specification-requirements of the system and all other efforts of the project such as training and roll-out, user documentation, database conversion, etc. CDP defines a "requirement" as anything that the client stakeholders need from the project work to achieve the project's goals/objectives. All project work is planned and directed with the end result in mind.

During Phase #2, CDP will work closely with OEHS staff to create detailed specifications over the course of a minimum of one full day and a maximum of five full days at OEHS' office; create an agreeable project plan; and then will execute the plan and customize the Base EH System to meet all of the requirements mentioned in this RFQ within the agreeable timeframe.

Determining the full scope of the project is the first step towards defining and building the Project Work-Plan (the road map for executing all project work and completing the project). All planning activities springboard from the platform of a well defined scope of work. The Scope & Requirements Management Plan outlines the methods, tools and techniques that CDP uses to determine the full scope of the entire project.

The table below shows an estimated Work Breakdown Schedule in high level phases in months for the project from the information we know today.

<b>1.0</b>	<b>PHASE 1</b>	<b>1 month</b>
<b>1.1</b>	<b>Base System *ONLINE*</b>	
1.1.1	Contract Executed	
1.1.2	Phase 1 Preparation	
1.1.3	Kick-Off Meeting (Webinar & Conference Call)	
	<b>PHASE 1 Complete</b>	
<b>2.0</b>	<b>PHASE 2</b>	<b>9.5 months</b>
<b>2.1</b>	<b>Develop a Project Plan</b>	
2.1.1	Develop a Requirement-Specifications Document	
2.1.2	Develop a Schedule	
2.1.3	Finalize Project Plan	
<b>2.2</b>	<b>Execute Approved Project Plan</b>	
2.2.1	Customize the Base System to the Requirement-Specifications Document	
2.2.2	QA Certifies WVENV System (Version 1)	
2.2.3	Customize Training Materials	
2.2.4	WV Approves WVENV System (Version 1) for Roll-Out	
2.2.5	Acquire LHD Tablets/Laptops	
	<b>PHASE 2 Complete</b>	
<b>3.0</b>	<b>PHASE 3</b>	<b>1 month</b>
3.1	Confirm "Installation & Training" Readiness	
3.2	Installation & Training	
3.3	Go-Live	
	<b>PHASE 3 Complete</b>	
3.4	WVENV System (Version 1) Acceptance	<b>4 weeks</b>

### *Gather Specification and Requirements*

As CDP and the client work through Project Initiation and a kickoff meeting, target dates are scheduled for requirements gathering meetings. These initial meetings serve the project by enabling CDP to get a firm grasp of the client's organization structure, business processes, communication chains, details of the current method of data capturing and reporting, etc. The end goal of gathering requirements is not only to define the functionality/design of the software, but to ensure that the system is designed to fully support the clients' business needs. Properly defined requirements ensure that integrating the new system into the client's processes occurs naturally and smoothly.

Specification-Requirements Gathering Meetings are similar to Joint Application Design (JAD) Sessions or Focus Group Workshops. CDP will facilitate interviews, brainstorming discussions, process mapping/diagramming, off-the-shelf prototyping and other tools to arrive at a consensus between the expert stakeholders regarding the requirements. CDP recognizes the best way to achieve success is to establish a common understanding of what success should look like at the end of the project.

#### Specification-Requirements Gathering Meetings

##### Participants

CDP will request the client to identify all "expert stakeholders" within their organization. Expert stakeholders are persons with subject matter expertise on the business processes and data capturing/reporting needs. The number of expert stakeholders to participate in requirements gathering

and their level of effort will vary depending upon the size and complexity of the project. These representatives, however, will be engaged throughout the project.

### Process

Requirements Gathering will consist of decomposing the initial requirements outlined in the RFQ and the Questions-Answers responses. System Requirements will be progressively elaborated through the client's daily flow of business and the respective applications within the system. Additional project requirements, such as Training, will be decomposed by the needs and constraints of the client.

CDP will demonstrate the user interface and functionality of existing, live systems (currently operational) as it supports the requirements outlined in the RFQ for the new client. The expert stakeholders will participate in review and discussion over the functionality and provide feedback for customizations based upon their specific needs. The Project Core Team participants will be responsible for ensuring the expert stakeholders' discussion is collaborative and productive, making efficient use of group decision making.

*Providing the expert stakeholders with a preview to the system enables them to conceptualize the system's flow and functionality as it should support their particular areas of business. Customizations that must be modified or created new are communicated directly from the end-users to the Technical Lead of the project. This eliminates much confusion and guess-work over potential ambiguity. It provides CDP with a full understanding of the end-users' needs and provides a firm foundation for the end-product's "fitness-for-use."*

In addition to defining what the requirements are, the CDP Project leads will be prompt client stakeholders to define the Acceptance Metrics. As each specific requirement is progressively defined (system functionality, training method, user manual format, etc.), the discussion will go into detail for the outcome. Acceptance criteria will be as specific as is necessary depending upon complexity of the requirement. The acceptance metrics are documented alongside the narrative descriptions of each requirement in the Specification-Requirements Document. Acceptance metrics become the baseline for measuring completeness and obtaining deliverables acceptance throughout the project.

### Requirements Acceptance

One of the intentional by-products of the Specification-Requirements Gathering Sessions is that all stakeholders now have a feeling of ownership and a buy-in to the project. The end-users' confidence in the system functional requirements gives confidence to the Project Leads in designing the end product. The client's stakeholders have given input to the additional requirements that support and manage the roll-out. The participation produces sound requirements and facilitates a warm acceptance.

*Customizations that are determined to be outside of the scope of the RFQ requirements will be sent through Integrated Change Control ([Change Management Plan](#)).*

### **Document Requirements**

The requirements of the project (both the functional requirements of the system and the general requirements of the project) are documented in a Specification-Requirements Document. This document serves several purposes:

- Defines and details the customizations defined by the expert stakeholders
- Verifies requirements are aligned with the business goals/objectives
- Prioritizes requirements
- Traceability Matrix regarding requirements decisions and change control
- Documents areas of acceptance criteria

The Specification-Requirements Document serves as the scope baseline of the project and will be formally approved with the signatures of the appropriate designees (both client and CDP). All work efforts contributing to the project will be planned and managed according to the requirements. The CDP Project Manager will update the Risk Management Plan with any initially discovered risks. While largely undeveloped at this point, all of the Management Plans that make up the Project Management Plan are being initialized to jump-start the planning effort and ensure nothing slips through the cracks.

### Define Scope

A common mistake in IT projects is that requirements gathering and definition is considered finite. CDP iteratively employs the intense progressive elaboration over the requirements throughout the life of the project. All CDP project team members proactively look out for changes to the requirements and scope throughout the project. At the onset of the Planning Phase, the project team plans all of the work to satisfy the requirements according to the acceptance criteria defined. This enables the project team to determine what work is/is not included in the project from the very beginning.

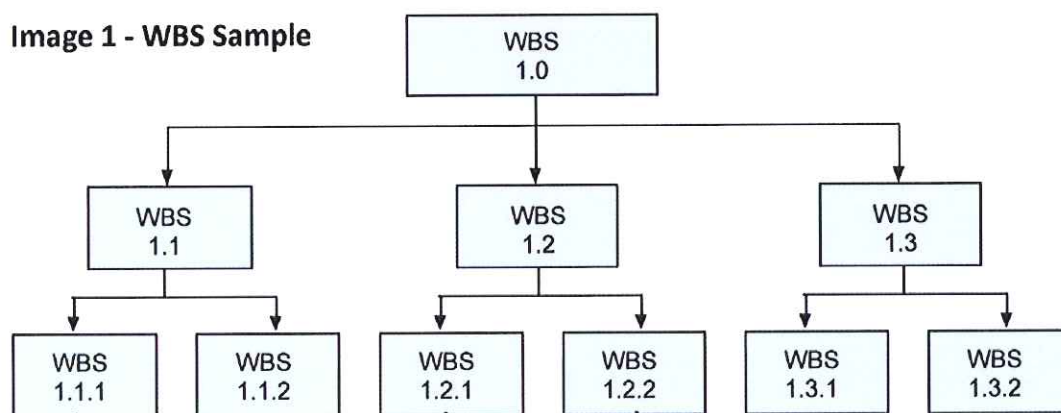
CDP decomposes the requirements by creating a Project Work-Plan; PMI's "Work Breakdown Structure." The Project Work-Plan including all of the tasks and identified deliverables become the scope baseline and the Work-Plan is used in conjunction with a work authorization system to verify and control scope. All requirements are broken down to a level that is manageable and can be realistically estimated. This process is completed for all requirements that require a work effort.

### Create Project Work-Plan

A Project Work-Plan is deliverable-oriented and is created from the input by the team. The CDP Technical Lead and Project Manager walk the team through the project's requirements and through the entire project. Each requirement is analyzed by the project team to determine what must be completed to satisfy the requirement and meet its acceptance criteria. For example, the development and technical team members create work packages and tasks to write the lines of code and build the system. Another example is the training and customer support team members create work packages and tasks for the training and implementation efforts (drafting the user manual, creating a training demonstration, writing interactive training scripts/use cases, etc.). Creating the Project Work-Plan is one of the most intense resource efforts of the project. ALL persons with an active role must participate and contribute to the planning effort of getting the work done.

The Project Work-Plan looks similar to an Organization Chart and relationship between the work packages and decomposed tasks are similar as well. Tasks and activities (detailed work efforts) are organized and rolled up into their respective Work Packages (see Image 1 – WBS Sample).

**Image 1 - WBS Sample**



Work Packages are created from the requirements, as requirements and corresponding deliverables are grouped and organized by commonalities. For example, all coding/development work targeted at satisfying the functional system requirements, will be categorized in development work packages. Work Packages are created and organized in a fashion that is logical to the team for completion of the project.

Work Packages are decomposed into the task level. The team members responsible for executing the task to produce the deliverable are primarily responsible for thinking through the work effort and fully defining the task. While each task is typically owned by one or two persons the decomposition and planning still may rely heavily on a team effort. The team plans the work together with shared expertise and the ability to quickly identify and discuss potential risks, constraints and dependencies. This facilitates cooperation between the team and primes the team for open communication and a transparent project work environment. *Pre-identified risks are logged in an initial Risk Register. Pre-identified dependencies and constraints are noted and documented in the definition of the task.* Task definition concludes with each task being physically described and fully documented in the Project Work-Plan's Task Definitions (see Image 2- Task Definition Sample).

**Image 2 - Task Definition Sample**

<b>Project Name</b>	<i>CDPims</i>
<b>Work Package Name</b>	<i>Module Development</i>
<b>Task Name</b>	<i>1.2.1 Establishment Record Search Page Design</i>
<b>Task Owner(s)</b>	<i>John G.</i>
<b>Deliverables</b>	<i>Detailed description of the Establishment Record Search Page would appear here.</i>
<b>Additional Resources</b>	<i>Tom B. will review the design.</i>
<b>Time Estimate</b>	<i>8 hours</i>
<b>Scheduled Start Date</b>	<i>10/1/2010</i>
<b>Scheduled Completion Date</b>	<i>10/2/2010</i>
<b>Actual Start Date</b>	<i>TBD</i>
<b>Actual Completion Date</b>	<i>TBD</i>
<b>Backward Dependencies</b>	<i>1.1.2 Task Name</i>
<b>Forward Dependencies</b>	<i>1.2.2 Task Name</i>
<b>Additional Risks</b>	<i>Some initial risks may have been identified here.</i>
<b>Completion Approved By</b>	<i>TBD</i>
<b>Completion Approved Date</b>	<i>TBD</i>

Creating the Project Work-Plan identifies all of the deliverables, centers the team's focus on the work that needs to be done and it makes the project work "manageable." The process forces the team to think through the entire project and it helps the team members see the full picture and where their work fits into the whole project. During this process and as planning becomes more detailed, the focus of the regular strategy meetings hones in on further detailing the requirements and intended deliverables. All identified risks during the decomposition process will be record by the Project Manager into the Risk Management Plan for review during Risk Assessment.

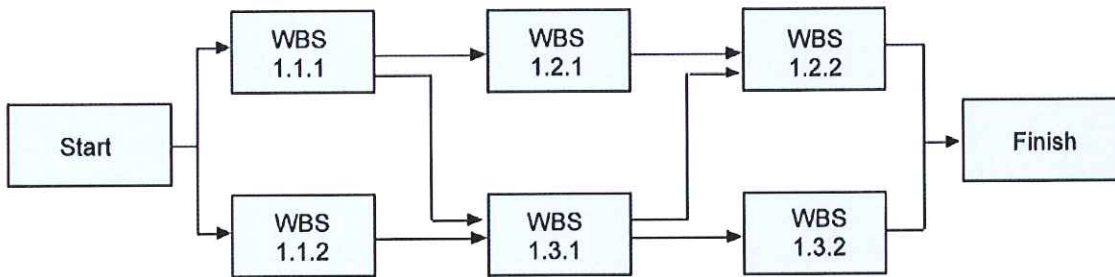
CDP considers the Project Work-Plan to be an integral Management Plan; it is the basis for managing the work to be done and thereby manages the full scope of the project. The Project Work-Plan is a central component of the overall Project Management Plan and this process ensures a plan that is well understood and believed to be achievable. The project has achieved full team buy-in with an attitude and commitment of success. The project has a fully defined planned with a picture of the end in mind.

## Time Management Plan (Formally Approved Schedule)

### Sequence Tasks

The next step in building the Project Management Plan is to determine the schedule. The project team, lead by the CDP Project Manager and Technical Lead, organizes the tasks from the Project Work-Plan into “nodes.” Using Precedence Diagramming the tasks are sequenced in logical relationships in a Network Diagram (see Image 3 – Network Diagram Sample).

**Image 3 - Network Diagram Sample**



Schedule dependencies and risks are assessed. New risks and risk updates are performed with the Risk Register and Project Work-Plan details. New dependencies and dependency updates are also documented in the Project Work-Plan details in each work package and task respectively. Time estimates, having already been calculated by the project team, will be taken from the Task Definitions in the Project Work-Plan and assigned to its task node.

### Time Estimates

The project team estimates the time-to-complete each task with the refinement of the task’s details and logical understanding of what comes before and after the tasks. A Three-Point Estimate (PERT analysis) is conducted the project team. The persons responsible for completing the work estimate the time in three outcomes: Most Likely, Optimistic and Pessimistic. The process of coming up with the three distinct time estimates requires the estimators think about the risks, constraints, lessons learned and other factors that positively or negatively influence the ability to complete the task.

$$\text{Estimated Task Duration} = \frac{\text{Optimistic} + (4 * \text{Most Likely}) + \text{Pessimistic}}{6}$$

The Three-Point formula calculates a realistic time estimate. *For example, a task that will most likely take 4 hours, may only take 3 hours, but could take up to 7 hours has an Estimated Task Duration of 4 hours and 20 minutes.* The result of this type of estimate is a realistic schedule that gains team buy-in and promotes a willingness to commit to and meet deadlines. Depending upon the complexity of the task, work package or project – the CDP Project Leads may conduct a review of the schedule and perform a reserve analysis calculation.

### Develop/Compress Schedule

The time estimates are assigned to each respective task in the Network Diagram. A critical path is calculated by determining the longest path of tasks, making it the baseline for a target schedule. Determining the critical path identifies which tasks will require watchful monitoring and will require immediate responses for issues. The

critical path also helps determine which tasks have available float or slack (amount of time an activity can be delayed before delaying the project).

Client and CDP project team member calendars are acquired and submitted to the Project Core Team along with the Critical Path total estimate-to-completion. Client and CDP organization calendars are also submitted for review. Holidays, vacation times and all other calendar-related factors are placed on the calendar to identify all scheduling constraints.

A “start date” for scheduling the tasks is chosen by the Core Team. The tasks along the critical path are scheduled to the dates of the calendar by their estimated-task-durations. Tasks outside of the critical path are then scheduled onto the project calendar. Resources availability constraints are assessed and mitigated to finesse the schedule. A project calendar overview assessment is conducted by the Core Team to look for options to compress the schedule.

Schedule compression is a technique to shorten the length of time to complete the project without affecting scope or increasing cost. Shortening a project within those two constraints is often difficult. CDP employs two main compression techniques:

1. Fast Tracking – Fast Tracking involves reviewing the logical order of the tasks to determine if any sequential tasks with finish-to-start relationships can be worked in parallel and completed simultaneously.
2. Crashing – Crashing a project involves reviewing tasks to determine if adding resources will shorten the duration.

A formal schedule is drafted from the calendar dates. The schedule will be reviewed by the Steering Committee and formally approved as the schedule baseline.

The schedule baseline is used to measure performance throughout the project. Progress reporting is typically expressed in the interest of time, for example, “We are 4 weeks from Go-Live.” The schedule baseline is often affected by project changes and risk events. The CDP Project Manager will be responsible for controlling the schedule and will have the authority to organize the project team (both CDP and client) to re-estimate and create options to compress the schedule.<sup>2</sup> Change requests with an approved increase in the schedule are an update to the Project Management Plan and become a part of the schedule and scope baselines.

## **Cost Management Plan**

### **Pre-Contract**

CDP completes an evaluation of every potential project for which an RFQ Response and Bid is prepared. The plan is created by the Project Leads in accordance with the Leads’ general understanding of the requirements and deliverables as described in the RFQ. For example, the technical experts review the system requirements while the documentation and Customer Support experts review the training requirements, etc. CDP’s experience in serving the business of Public Health and specifically, Environmental Health and Clinic Management, helps the Project Leads pre-estimate an accurate level of effort required for the project.

The Project Leads will engage the potential project team members and review the requirements. The project team will brainstorm lists of questions to help clarify any areas of ambiguity. At the first and all

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<sup>2</sup> *The need for organizing to create options should rarely occur. All identified risks during the schedule creation process will have been updated into the Risk Management Plan for review during Risk Assessment. The appropriate risk responses will have already been discussed and documented. A risk event owner will have been pre-assigned. When the risk trigger(s) occur, the appropriate risk owner and CDP Project Manager will be notified and the risk response plan will be executed.*



available opportunities, CDP will respond to the “Question and Answer” option and perform the first round of progressive elaboration over the requirements outlined in the RFQ. Questions submitted will come from the project team’s requirements review exercise. The answers submitted by the Client for all questions posed by all potential vendors are reviewed by the CDP project team with the requirements. The CDP Project Leads review the additional clarification with the project team, perform a SWOT analysis and re-estimate any work effort that may have changed. This process refines the estimate to give the CDP Sponsor an improved level of accuracy before a bid is proposed.

### Contract Negotiation

Projects are expected to meet strict deadlines with resource constraints and unapproved changes to the scope can affect the success of the project. During contract negotiations and requirements gathering CDP will walk the client’s expert stakeholders through each requirement outlined in the RFQ and pre-design the functionality of the system. Any feature, enhancement or area of business not covered in the RFQ will be determined to be out of scope and CDP will lead the client through the change control process. Approval from the client sponsor will add to the scope of work. Any change to the project results in an update to the Project Management Plan and the scope, schedule and cost baselines will be reviewed for adjustment.

Post-Contract signing, the CDP Project Manager will report Earned Value Measurement calculations internally for the purpose of measuring the accuracy of pre-bid estimates and potential scope creep identification.

### *Quality Assurance Plan*

The purpose of any test plan is to describe the overall product test strategy across all test phases. The plan documents ‘how’ the CDP Project Team intends to accomplish testing of the system. CDP uses a methodology comprised of multiple, well integrated best practices and test disciplines to achieve high quality, consistent results.

#### *QA Testing Best Practices:*

##### 1. Functional Verification

The purpose of the functional verification testing is to validate that the code meets the requirements described in the Specification-Requirements. This is more granular ‘drill-down’ testing. Input validations, screen navigation and presentation, boundary tests, and basic scenarios are exercised in this phase. The goal is to ensure that the smaller pieces work individually and as expected before moving on to a larger test.

##### 2. System Integration & Regression

During system/integration testing, the focus is on the whole solution, verifying that the existing system performs end-to-end as expected with the new changes integrated. The objective of the regression testing is to ensure that code changes have not created new problems in the functionality of previously tested use cases. To achieve this goal, a subset of each of the previous tests will be re-run. Test that are chosen for regression are generally test cases that test the new functions in a normal client operation and areas that have been problematic during the FVT stage.

##### 3. Performance Validation

CDP will ensure that existing performance (responsiveness and availability of the system) is not degraded with releases. While a performance test may not be necessary for every change that is made to the system, it must always be considered. CDP will partner with performance expert analysts, as needed, to assess system performance and make recommendations for the existing target goals. This stage of testing optimally begins towards the end of the system or integration test. Planning the performance evaluation towards the end of the test cycle ensures that the code is

stable and near completion, but leaves enough time in the delivery schedule to allow for any performance-related problems to be addressed.

#### 4. Early Test Involvement

CDP's Quality Assurance team is involved early on in the planning stages of the system deliverable, and engaged throughout the development and implementation cycles. This end to end interaction has proven success and enables the QA Team to gain an understanding of the development changes being implemented. Early test involvement also allows ample time for any special test needs to be identified, such as equipment, software licenses, and training, as well as resource requirements.

#### 5. Secured Test Environment

QA environments are planned and built to represent customer environments in order to achieve the proper level of testing and coverage. These environments are maintained and controlled by QA staff only to ensure the integrity of the test environment. The QA test labs are access controlled in a secured area. No changes, hardware or software related, are permitted to these environments without QA approval. The defect tracking and release process also helps prevent our 'customer-like' test environments from being compromised by random, untraceable, code updates.

#### 6. Error/Defect Tracking

A reliable defect tracking system is an integral part of any development organization. CDP uses the Elementool® issue tracking system to track defects. The defect tracking system provides a structure for logging key data into searchable, reportable fields in addition to the freeform areas that allow the finer details to be documented. Managing issues in this fashion creates a self-maintaining information repository that is used the organization. Reported issues follow a well defined lifecycle to ensure that they are addressed and resolved quickly and efficiently.<sup>3</sup>

The QA team is responsible for providing accurate and complete information when reporting a defect to the development team and logging the information in the Elementool ® system respectively. A standard defect template will be used for each defect to document the problem determination information in a uniform, professional and organized format. A sampling of the information that must be provided is listed below.

- Environment description, server where the failure occurred
- Problem description including hardware & software platform
- Alerts or failure messages
- Screen captured
- Clear and succinct recreate steps [if known]
- Frequency of problem

#### 7. Continuous Improvement

The CDP team recognizes the importance of revisiting and refining processes to achieve continuous improvement. Team retrospectives are conducted regularly to reflect on the prior deliverables and assess 'what worked' and 'what needs improvement'. Sessions such as this are often the foundation for growing best practices. These sessions are documented and followed to completion by the project manager.

#### 8. Skills Transfer

Successful development and deployment of a product goes hand-in-hand with supporting customers and end users of that product. The QA team takes an active role in communicating and sharing information with the Customer Support teams regarding new and upcoming changes. This is accomplished in a number of ways, the most prevalent being the skills transfer sessions that occur prior to putting the code into any customer's hands. This strategy keeps our support professionals up to speed, making them ready to assist customers on 'day 1'.

#### 9. Causal Analysis Review

<sup>3</sup> For a description of the defect tracking tool used, see CDP Customer Support Standard Operating Procedure.

Causal analysis reviews are another form of continuous improvement and are performed to monitor code quality and test effectiveness after deployment. Defects that are reported after changes are implemented in the field are reviewed periodically to determine what gaps there may have been in test coverage that caused a bug or defect to be missed. Information from Customer Support team is also used in this analysis.

**QA Baselines:**

In the matrix below, CDP has identified and defines critical Quality Assurance Standards/Baselines. Problems that occur within the areas below could cause disruption in system deployment, performance, or use. QA evaluation and testing against these potential points of failure ensures a robust end-product that is free from the major causes of disruptions. CDP executes three levels/phases of QA Testing (Initial, Beta and User Acceptance). Each project is different and may require additional areas to be defined, tested and measured to ensure quality for the end product.

IMS/MOBILE Quality Assurance Standards	Description	Performance Criteria
1. Requirements/Business Rules Verification	Assurance that all client business rules and requirements have been taken into account.	Comprehensive and clear coverage of user requirements and business rules in a manner that supports development work
2. Coding Integrity and Correctness	Potential defects or logical errors with VB.net, Crystal Report causing faults or performance problems. Code is fundamentally sound without major, recurring problems in syntax, coding conventions, or logical errors.	- 100% correct calculations for system functions (auto calculations, etc.) that impact critical business functions (e.g., entering an inspection, suspending an establishment's permit, etc.)
3. Interface Data Transfers	Exchange of data with any other third party or internal (client) application or system.	-100% of data exchange cases and mutual triggers are in place and correct. Data transfer executes in its pre-determined interval (real-time, daily, weekly, etc.)
4. User Interface Effectiveness	Clear interfaces that are "fit-for-use" and intuitively invoke the proper function or deliver the proper information. This system should flow and not be prone to "user error" in everyday use.	- 100% data input continuity and validation. - Formal approval from user test subjects on layout, design, and functionality
5. CDPmobile Synchronization Functionality	Proper integration and correct functioning of the mobile offline solution where applicable.	-100% correctness with the offline completion-online synchronization record create/update.
6. Reporting	Effectiveness, correctness, and	- all specified requirements are completed

	proper format of standard, predefined reports and other generated products.	- client approval of content and design
7.Documentation Correctness, Completeness, and Clarity	Content, format, and overall quality of written and on-line user documentation, technical documentation, and help/error messages to users.	-client approval of content and format
8. Database Design Performance	Efficient database design and effective use of database software techniques to optimize performance and response time (data table indexing, and database design.	- instantaneous response for data entry, update, and validation operations - completion of complex queries in 5 seconds or less
9. Internal Back-up at Frankfort/Romeoville Site	Robust, reliable, regular back-up of code and database at the Frankfort/Romeoville sites and proper configuration for adequate level of fault tolerance.	- replication services in place and working - nightly back-up procedures in place and operating with additional copies of back-ups stored at both on-site and off-site locations.

The strategy outlined below results in a solid repeatable process which yields repeated success. These sections describe CDP's overall approach for testing and validating new development, customizations and changes for new systems. This process insures the quality of the code and maintains customer satisfaction.

### *Testing Approach/Process*

As stated, a solid repeatable process is a successful process. CDP's test process typically consists of the preparation of the test Story Guide (test scenarios and data samples), test use case completeness review, test acceptance/entry criteria, first-pass execution and finally regression phase execution. The same disciplines and quality measures are adhered to whether the test is of a single line item during a functional test or a collection of enhancements for a release during a system test. The phases include:

- Test Preparation
- Alpha Testing
  - Regression Testing
- Beta Testing (User Acceptance Testing)

### Test Preparation

The first step is test preparation: Planning the test coverage and use cases based on the Specification-Requirements and the Project Work-Plan's development Work Packages and Task Definitions. The CDP QA team, lead by the CDP Technical Lead, plan scenarios giving emphasis to main paths and error handling paths.

The CDP Technical Lead takes the required functionality that will be coded to support the business processes and outline a list of executable use-cases. Use cases are referred to as "stories." Story scenarios are maintained in the Story Guide (sometimes referred to as "scripts" or "test scripts," a

repository document (see Images 4 & 5), which is outlined, detailed and presented to the client for formal review and approval. The client's expert stakeholders will review the Story Guide for coverage and completeness before the execution of testing begins. The client will submit test case additions, modifications or even deletions to CDP. The review sessions serve as checkpoints, as the Story Guide is progressively elaborated, to ensure that test coverage is sufficient and also helps to identify drill-down acceptance criteria for the specification-requirements provided.

## Image 4 - Story Guide Sample 1

### Story Guide Master List

1. **Establishment Search Page** - This story will go have a user sign onto the CDP Portal, go to the establishment show table page, and search for an establishment first by name and/or address (making note of a particular establishment number) and then after resetting the page, searching for the same establishment using the establishment number field. The user will confirm a successful 'find' of the establishment in each case. The user will then hit the clear button to reset all filters and proceed to search for a group of establishments using a one of or a combination of the following filters: reporting area, establishment type, street name, city, zip code and/or owner name. Optional: export result set of establishments to Excel or PDF.
2. **Add a new establishment record** – This story will continue where story # 1 finished. The user will confirm that the establishment to create does NOT already exist using the search filters reviewed in story # 1, and then proceed to the "Add" establishment page. The user will proceed to enter all necessary and appropriate demographic information for the establishment and click Save. Upon clicking Save, the user will be returned to the establishment search page with the new establishment already selected.
3. **Changing demographic information for an existing establishment (will include use of all "tabs" containing establishment information)** - Continuing on with the new establishment built during story # 2, the user will

## Image 5 - Story Guide Sample 2

### Story 1 - Establishment Search Page

This story will go have a user sign onto the CDP Portal, go to the establishment show table page, and search for an establishment first by name and/or address (making note of a particular establishment number) and then after resetting the page, searching for the same establishment using the establishment number field. The user will confirm a successful 'find' of the establishment in each case. The user will then hit the clear button to reset all filters and proceed to search for a group of establishments using a one of or a combination of the following filters: reporting area, establishment type, street name, city, zip code and/or owner name. Optional: export result set of establishments to Excel or PDF from [Establishment](#) link on Search page.

Date Presented: mm/dd/ccyy



#### Steps:

1. User sign-on to Portal
2. Select [Establishments](#)
3. Enter a portion of an establishment name (note the 'type ahead' feature) and/or a portion of a street address.
4. Click the Search button or hit the Enter key. (Enter key automatically activates the Search button.)
5. Check the result set via the "pagination" area showing the number of results and the "page" you are currently on.
6. Make note of one of the establishment numbers found during the above search. Est # \_\_\_\_\_
7. Hit the Clear button to reset the page.
8. Once the page has refreshed, enter the establishment number noted in step 6 in the [Establishment](#) field and click the Search button or hit the Enter key.

QA Testing is considered part of the development within the Project Work-Plan. However an additional Work Package and separate Task Definitions may be required updates to the Project Work-Plan. The QA Tasks are scheduled and the Project Management Plan is updated.

## Test Execution

This phase consists of executing the stories written during the preparation stage. These tests are run independently of each other and are phased to test in a logical order.

### Alpha Testing

Alpha Testing occurs in a 3-step approach, ensuring that multiple team members have validated the completeness and accuracy of the code.

### Developer Testing

The first round of alpha testing occurs incrementally and is performed by each developer "locally" using a virtual directory established on the local drive of their PC, which connects to a full database on this development server. Local testing consists of the developer compiling the code and then simulating basic user entry while stepping through the code line by line noting values, any re-directing scripts, records accessed, records written, etc., being passed by the code.

The second round of alpha testing occurs weekly throughout the development phase. Once tested locally, the developer is able to implement a version of a given application onto the development server for remote accessing. The Technical Lead will then test out the application on this server, and upon approval give permission for release onto our test server. The Technical Lead will login to the system as a test user and execute the scripted "stories" based on normal business scenarios. The Technical Lead performs the first user simulation entry to verify the acceptance criteria and some error-based paths are fundamentally sound and free from defect. Any errors or defects found are logged into the Elementool® backlog of errors and will be worked and fixed by the developer prior to the next status update. Pass rating at the second round of testing is achieved by the release code meeting the acceptance criteria of the functionality being created and the automated flow of navigation is logical from page-to-page throughout system.

### Testing Entry Criteria

Test Entry Criteria defines what information and capability is required for the product to be deemed "ready" for formal QA Testing.

- Test Plan and Stories are reviewed and approved.
- Test Preparation work is complete.
- QA staffing identified, committed, and properly trained.
- The code is complete, has undergone a code review, and an initial/developer test for each new or changed function has been completed with no remaining high severity defects.
- A project lead has reviewed the new or changed function and approved it with no high severity defects.
- Any test tools required by the test team are available.

The third round of alpha testing is a formal QA Testing procedure. Meeting the Testing Entry Criteria deems the code release "ready" for testing by CDP's QA staff. QA associates are chosen based upon qualifications and are appropriately trained for testing the system in a deliberate and thorough manner. Functional verification testing is testing at the granular level. The QA associates deliberate perform the steps to verify the acceptance criteria and some error-based

paths to be sound and free from defect. All errors/defects are logged within the Elementool® system respectively (see [QA Best Practices](#)).

### Test Execution Criteria

Execution criteria enable the test to keep moving forward.

- All changes to code following the start of functional verification test must be related to a defect or feature, regardless of who initiated the change (test team, programming team, the field, etc.).
- Every defect should contain enough description and recreate text for the test team to tell what changes are being introduced.
- The number of actual defects should not exceed the control limits and the defects must be fixed within a reasonable Turn-Around-Time (to be determined based upon the severity level of the error).
- The defect backlog must not become so large that it blocks sufficient testing progress.
- Fix Releases are delivered per the agreed schedule having passed a minimal function test.
- A list of the changes must be available for each fix release (defects and features).
- All fixes must be tested by the programmer prior to delivery to the test team.

### Test Status Reporting

Test status is presented at the weekly staff meeting. The test status report is intended to aid the CDP Project Manager and Technical Lead in managing product development. The status report will show:

Testing Status – *What was tested in the last interval?*

Projected Status – *If testing is behind schedule, look to the Project Management Plans to determine how we will compensate for the delay.*

Defect activity – *What is broken? Any major impediments that could affect the planned test exit date?*

Testing Status Reporting enables the development team to review the information and assess the impact to new development.

### Regression Testing

As development progresses, the level of complexity between the applications grows. Changes requests to development are approved. The purpose of Regression Testing is to ensuring that new releases and changes do not impact existing function. This is standard operating procedure for every phase of testing. The core set of test scenarios with the Story Guide provide ample representation for the core existing functions in the base of the system. As part of the cleanup phase of the test cycle, scenarios that were created and executed against the new functions are reviewed and key scenarios are selected to be added to the regression bucket of test cases.

### Test Exit Criteria

Exit criteria ensures that the code deliverable is ready to move on to the next phase of Beta Testing (User Acceptance Testing).

- 100% of Functional Test Cases have been attempted.
- 100% of Critical and High severity defects closed.
- 90% of all medium and low severity FVT defects closed.
- An action plan must be created for outstanding severity 3 or 4 defects.

## Beta Testing (User Acceptance Testing, UAT)

User Acceptance Testing is the final stage of the test cycle that occurs prior to implementation in the field. To successfully enter this phase, the system must have met the criteria for all other phases defined in the test plan. UAT scenarios are similar to those executed during the system test phase and are geared even more so at true-life use case scenarios. UAT execution is performed by actual users of the system, using well-defined, step-by-step scenarios from the Story Guide. The client's expert stakeholders return to the project to play a large role in UAT.

The testing efforts up until this point have largely focused on discovering errors and defects – areas of the code that will cause disruption to the daily data entry and reporting needs. Acceptance Testing focuses on the system as a whole and it is tested against the Acceptance Criteria, defined in the specification-requirements.

Results are reviewed by the Project Core Team (both CDP and Client) for analysis. Components of the system that does not meet the acceptance criteria will be planned for resolutions and a subsequent release of another beta version. When all parties are in agreement that UAT has been completed successfully, the code is ready for implementation.

### **Staffing Management Plan**

CDP creates Project Teams based upon staff qualifications, experience and availability. CDP reviews the RFQ Technical Requirements with the respective potential team members to ensure an appropriate match of qualifications and skills to the scope of the project. Potential resources are interviewed by the CDP Sponsor, Technical lead and Project Manager to determine a comfortable fit within the project team and a willingness to accept the responsibilities of the role. The CDP Project Leads (Project Manager and Technical Lead) review and finalize resource requirements during Project Planning. CDP Sponsors formally approve the allocation of the requested team members for all project work within the Project Work-Plan.

The CDP Project Leads proactively meet with all CDP Sponsors and Senior Management in Resource Allocation meetings. Resource reviews occur monthly to review each team member's workload and project assignments. Project-specific resources are reviewed daily as a part of the SCRUM stand-up, one of the adopted agile development methodologies. The Project Manager and Technical Lead review project-specific resources and their upcoming tasks as defined in the Project Work-Plan during internal weekly project team meetings.

As project constraints and other factors shift and change priorities, CDP is flexible to reallocate the appropriate personnel to produce high-quality deliverables within the scope and schedule baselines. All resource responsibility/role changes are communicated in advance to the affected CDP Sponsors, CDP Senior Management and CDP Project Managers.

*An often overlooked yet integral component of the Staffing Management Plan is the Client's resource requirements. CDP works with the Client through all phases of the project to identify skillful resources to participate in tasks and activities such as: Specification-Requirements Gathering, Strategy Meetings, Design/Concepts Reviews, User Acceptance Testing, Training & Implementation, etc.*

### **Communication Plan**

The Communication Plan is initialized during Project Initiation at the Kickoff Meeting when the Project Leads share contact information and tentatively schedule the Specification-Requirements Gathering Meetings. The Project Core Team (CDP & the Client) will establish project roles, identify the communication needs and establish appropriate communication channels. The Communication Plan is very high-level early in the project



life-cycle, but will become more detailed as the project level of effort increases and collaboration needs become more prevalent.

CDP encourages that a communication plan should remain simple. The communication plan will answer: **When and how does who need to know what?**

**WHEN/HOW**

CDP and the Client will analyze the communication needs at each phase of the project. During Project Initiation, communication is less intensive and geared toward the outlook of the project. During Project Planning and Execution, communication is very intensive and geared toward the granular level of detail regarding project work. The Project Core Team will determine the appropriate use of all forms of communication: Strategy Meetings, Webinars, Status Reports, Emails, Conference Calls, etc. The communication plan will be updated as the communication needs are addressed throughout the life of the project.

**WHO/WHAT**

All stakeholders involved in the project will be transparent with information regarding their efforts. A RACI Matrix will be used by the Project Managers (CDP & the Client) in direct conjunction with the Project Work-Plan for ensuring that each task's progress and updates are communicated to all appropriate team members.

- Responsible – Who is responsible for actually doing the work?
- Accountable – Who has authority to approve or disapprove it?
- Consulted – Who has needed input about the task?
- Informed – Who needs to be kept informed about the task?

**Image 6 - RACI Matrix Sample**

<b>RACI Matrix Template</b>																					
Project Task \ Role	Project Leadership					Project Team Members					Project Sub-Teams					External Contributors					
	Role #1	Role #2	Role #3	Role #4	Role #5	Role #1	Role #2	Role #3	Role #4	Role #5	Role #1	Role #2	Role #3	Role #4	Role #5	Role #1	Role #2	Role #3	Role #4	Role #5	
Task 1																					
Task 2																					
Task 3																					
Task 4																					
Task 5																					
Task 6																					
Task 7																					
Task 8																					
Task 9																					
Task 10																					
Task 11																					
Task 12																					

CDP recognizes that the shortest distance between sharing information is to dialogue directly with the intended audience and to ask questions until all information is transparent and any confusion is eradicated. As a result, CDP makes effective use of regularly scheduled "Strategy Meetings." CDP will facilitate regular meetings as the primary method of communicating directly with the Client's team members. Strategy Meetings can occur on-site or via webinar and conference call.

The Core Team (CDP & the Client) will set a schedule of Project Strategy Meetings. Strategy meetings will take on different forms in different phases. The frequency, duration, agenda, etc. will change as the purpose and intended goal of each meeting is realized and communicated in advance.<sup>4</sup> Throughout the life of the project, Strategy Meetings are always “looking ahead” to the work and deliverables that must be realized.

In addition to the regularly scheduled strategy meetings, different phases of the project may warrant ad hoc meetings. The CDP and Client Project Managers will collaborate to determine the need, agenda and schedule for these additional meetings to ensure maximum efficiency and earned value.

### **Risk Management Plan**

CDP approaches risk management as prevention effort against uncertainties and potential mishaps that could negatively affect the project. The CDP Project Leads walk the project team (both CDP and Client) through a Risk Assessment process.

#### **Risk Identification**

The Risk Assessment process begins with a risk identification meeting. *The steering committee may elect to promote CDP and Client internal risk identification meetings prior to the joint effort, in order to make the most efficient use of meeting time.*

The project team will focus on the review of the Project Work-Plan, Task Definitions, Specification-Requirements Document, Communications Plan, Network Diagram & Schedule, and Lessons Learned from previous similar projects. The team will identify possible risks that could interfere with the success of the project. The team will look for both positive and negative risks, but will focus primarily on identifying those that would disrupt the project. Everyone involved on the project should be considered for input into the risk identification process. Each person has a different perspective and may provide insightful information. All risks should be considered for review when initially creating the list.<sup>5</sup>

The team will progressively elaborate each risk as the list is being created. Some validating of each risk must occur by the team.<sup>6</sup> Risks will be assessed as external or internal, technical, cultural, project management, etc. The source of each risk will be considered (e.g., a risk of customer satisfaction or a risk of resources). Risks that directly impact the Critical Path are reviewed heavily, but all risks are discussed for all areas of impact. The team may initially discuss and brainstorm potential solutions or work-around's for the risks, but no real effort will be focused on solutions until the risks have underwent qualification. The CDP and Client Project Managers will make note of all discuss points regarding the risks and update the Risk Management Plan.

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<sup>4</sup> For example, during development and the Executing Phase of the project, strategy meetings normally take on the role of demonstrations-for-approval. During these strategy meetings, the intent is to review and informally approve the development work on the system's core functionality.

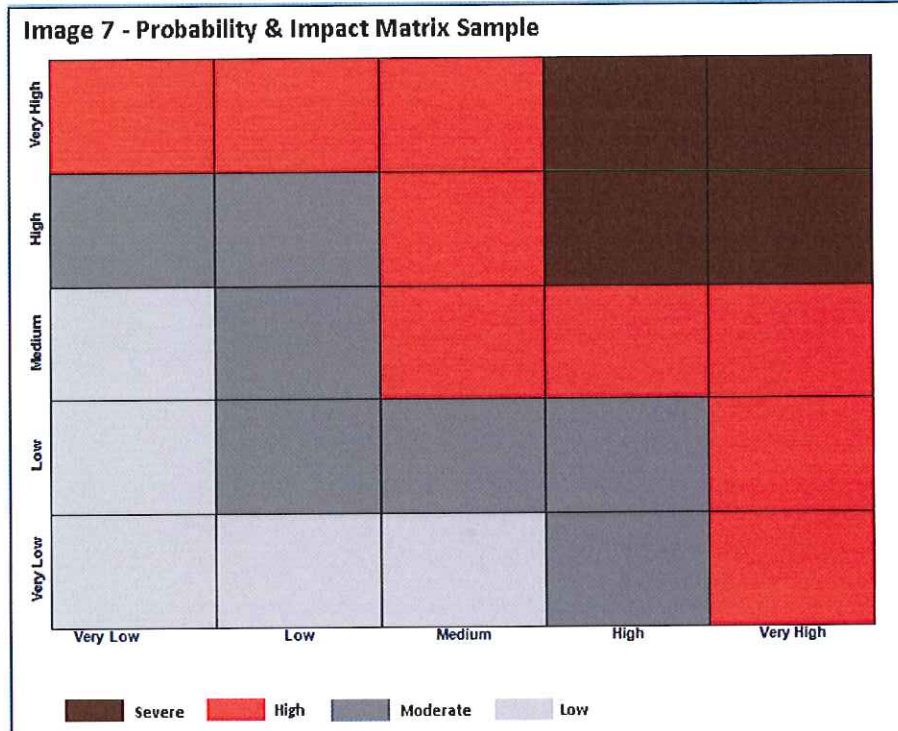
<sup>5</sup> Even Climate and Seasonal Weather can interfere with a project if an onsite meeting is delayed due to inclement weather travel delays. If the onsite meeting served as a formal approval review and sign-off, all future project work could be impacted by the delay.

<sup>6</sup> While inclement weather may be a risk, if the seasons for inclement weather occur during the Development phase of the project (as found in the Project Schedule), the risk impact would be determined minimal because most strategy meetings at this phase are normally occurring via Conference Call and Webinar.

## Risk Qualification (Ranking)

The team participating in Risk Qualification will be determined by the Project Core Team and will be composed of both CDP and Client stakeholders. The intent of pre-selecting a group of subject matter experts for risk qualification is to get quality input. Participants must be able to provide reliable feedback.

The team will define a rating system for the purpose of ranking both impact and probability for each risk.<sup>7</sup> A common understanding of the ratings standardizes the responses, so that a risk ranking of “1” means the same thing for all participants. Each risk that was identified is qualified and ranked on a probability and impact chart (see Image 7 – Probability & Impact Matrix Sample). The ratings will be submitted via Delphi Technique for anonymity and to preserve the integrity of the feedback. The Project Core Team will score the ratings and review the results to determine which risks are qualified to move onto Risk Response Planning and which risks are unqualified and should be placed on the Risk Watch List. This process is completed arbitrarily and without personal preferences so that the risks that receive the large planning effort are the high impact/high probability risks and the risks that are removed from detailed review are the low impact/low probability risks. Depending upon the complexity of the project’s risks, further review and ratings may need to be conducted.



## Response Planning

The Project Core Team will reorganize the appropriately affected team members for brainstorming sessions to think through design potential solutions. The objective of Response Planning is to determine the following:

1. What can be done to prevent the threat?
2. What can be done to decrease the likelihood of the threat?
3. What should be done if the threat occurs?

<sup>7</sup> CDP encourages teams to choose simple and low and odd numbered rating systems, such as 1-3, 1-5 or 1-7. This low number prevents participants from “over-thinking it” when rating systems are too broad. The odd number ensures there is a definite “average” and tie-breaking opportunities between similarly scored risks.

4. What should be done if the contingency plan fails?
5. What can be done to increase the risk for opportunities?

The team will think through the following four strategies for each risk:

- a. Avoid
- b. Mitigate
- c. Transfer
- d. Work-arounds

The team will decompose the responses thoroughly, very similar in fashion to the detailed level of decomposition with the Task Definitions in the Project Work-Plan. Strategies will evolve and new strategies will come to light. It is important that the team review each option to make certain the most efficient responses are chosen.

Risk Responses are either deliberate tasks that are organized for eliminating threats or they are response plans that will be executed if the threat occurs. The team, with oversight from the Project Core Team and/or Steering Committee will select the most efficient and appropriate responses that safeguard the project within its constraints.

The Project Work-Plan will be updated with the risks identified. Task Definitions will be updated with the list and descriptions of both Watch Lists (low impact/low probability) and Qualified Risks (high impact/high probability). Existing tasks may be updated with an increase of scope. New tasks may be created as a result of the approved preemptive risk responses. All updates to the Project Work-Plan, Network Diagram and Schedule will be documented. These risks will be flagged on the project schedule to be deliberately discussed during the regular strategy meetings.

In a final review, the team will determine if the Schedule should undergo a new Reserve Analysis for the purpose of building risk impact buffers into the schedule.

### ***Risk Tracking***

Once risk response planning is complete, the Project Manager will update the Project Management Plan. The project team will follow the Project Work-Plan's tasks and monitor the risks within their project work.

Risk updates will be taken at every strategy meeting. Task owners will be responsible for monitoring the risks as they appear on the task definitions in the Project Work-Plan. Each update on the status of the work being done will include an update on the risks involved. The CDP and Client Project Managers will coordinate each organization's effort to monitor the Watch List, the culmination of identified risks that were qualified as low impact/low probability, but should still be watched for an immediate need. When projects undergo change, the Risk Management Plan is reviewed for changes and new risks where appropriate.

### ***Database Conversion Plan***

#### ***Infrastructure Review***

A review will be done on all data elements and file/table layouts from the client's legacy database. The data elements will be matched up to the data elements on CDP'S Oracle database. Data elements that do not exist on CDP's oracle database will be reviewed by the DBA and with the clients as to their necessity and use. CDP will request the client to supply all file/table layouts, table definitions, data element definitions and database table interrelationships. If a legacy data element is deemed unnecessary it will be stored in our database in a text only field for reference. The client will be asked for specific acceptable values used for each table type and CDP required data element.

All tables will be reviewed to identify the most appropriate conversion process:

- a. Manual Data Entry (mainly used for support tables)
- b. Programmatic Conversion

The CDP Database Administrator will create a database mapping document, that show the relationships between the Legacy tables/fields and the Oracle tables/fields. This document will be provided to the client for review (and discussion if necessary) prior to actual data conversion.

### *Legacy Data Transfer*

The client will supply the database tables, flat files, etc. to CDP. CDP and the client will review file formats prior to the transfer. CDP may use various third-party conversion tools to bring the legacy databases into the format required for conversion.

### *Data Conversion*

The conversion will be written in Visual basic.net matching the data elements on the legacy databases table to the Oracle database tables. An error report is created during execution of the program and will be reviewed by the CDP Technical Lead. All data will be checked for validity and the client will be notified of any invalid data encountered from their legacy files.

Once data conversion has initiated, web-application development can begin. Data conversion refreshes may occur throughout the development life-cycle.

### *Data Verification*

Data review is an iterative process throughout the development phase. As the purpose of the strategy meetings take on the form of Demonstrations-for-approval, the client's expert stakeholders will be reviewing system functionality, viewing the client's data. Conversion errors and issues found are immediately logged into the Project Backlog and reviewed internally by the project team members responsible for fixing the conversion error(s).

#### Verification Methods:

1. CDP QA Testers review data during scripted and regression QA Testing. QA Testers will be able to catch obvious data conversion mishaps.
2. A final data review is conducted as a part of the User Acceptance Testing phase. Subtle or hidden conversion errors that are often overlooked come to light during UAT – testing participants are required to review the accuracy of the data as a part of testing the system's functional logic and rules.
3. Formal Approval of the data conversion process and conversion accuracy is acknowledged upon the decision of a "Go" during UAT results review. Quality of the data conversion and its success is discussed and approved prior to initiating a final conversion. Completion of data conversion will be formally approved with a signature accepting receipt and full implementation of the system.

### *Final Conversion (Live Production)*

The final conversion will be scheduled according to the set Go-Live date and all prior training and implementation efforts. The CDP Database Administrator will copy all tables from the Test environment into the Production environment and verified. The client will provide CDP with a final conversion dataset to be converted into Production. The Database Administrator will run the final conversion. Any errors resulting from the final conversion will be reviewed and worked through by the client Legacy database team member and the

CDP Database Administrator. The final conversion will be reviewed by the CDP Technical Lead prior to initiating Go-Live.

### **Configuration Management Plan**

Configuration Management addresses both the software versioning control and documentation versioning control.

#### **Application/System Level**

All systems are developed by CDP utilize 4 separate server environments for development and version release. These environments are as follows:

**DEVELOPMENT** – Used for Developer Testing and Technical Lead review, testing and approval.

*Developer testing occurs “locally” using a virtual directory established on the local drive of their PC, which connects to a full database on this development server. Local testing consists of the developer compiling the code and then simulating basic user entry while stepping through the code line by line noting values, any re-directing scripts, records accessed, records written, etc., being passed by the code.*

*Technical Lead testing occurs as a simulated user and the execution of the scripted “stories” based on normal business scenarios. The Technical Lead performs the first user simulation entry to verify the acceptance criteria and some error-based paths are fundamentally sound and free from defect.*

**TEST** – QA Testing and User Acceptance Testing. Once any issues have been resolved and user accepts, the updated version of the application is given approval for release into production.

**PRODUCTION** – Live user environment.

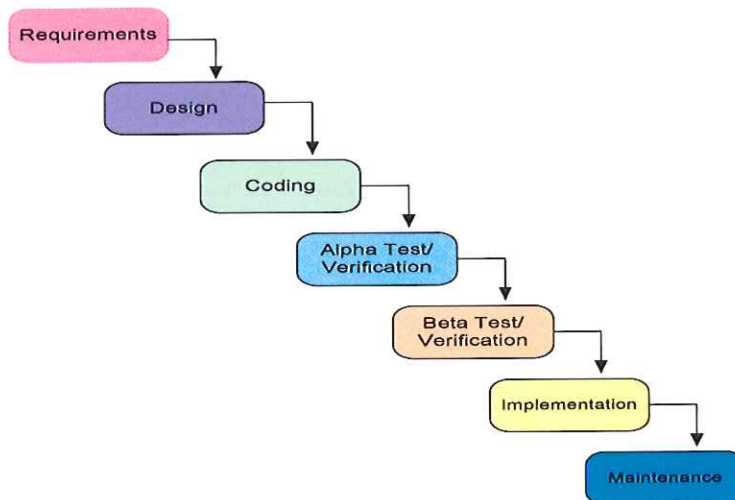
**DEMO** – A 4<sup>th</sup> server environment exists which is mainly used for CDP sales staff to perform demo’s to prospective clients. However, this environment CAN be used if needed for an additional level of acceptance testing, or used as a backup to the staging server under extreme circumstances.

Every version release onto the staging, production, and demo servers is accomplished by submitting a formal request to CDP’s NetOps staff (Networking/Operations) via our SharePoint® server. Once submitted, NetOps will complete the release to the server(s) specified and an automatic notification is sent to the submitter for confirmation. A complete history of version releases is stored on the SharePoint® server for an indefinite period of time and can be used for tracking.

#### **Application/System Level Configuration Management within the Development Lifecycle**

1. Requirements – CDP will visit customer to review current system functionality and document any/all client specific changes
2. Design – CDP will then review Oracle database in its current state to identify any necessary changes and/or additions.
3. Coding – CDP to begin coding new business rules into applications and running of internal alpha testing procedures. The alpha testing at this point is first performed by the developer and the reviewed/tested by the Technical Lead.

4. Alpha Test/Verification – CDP will run individual application tests, including all possible navigations, along with scenario testing utilizing written scripts. This level of testing is performed by CDP’s QA Team.
5. Beta Test/Verification - Beta versions are released to users for user acceptance testing. Results submitted to CDP for subsequent resolutions and release of next beta version.
6. Implementation – Upon completion of user acceptance testing, CDP releases application(s) into production. For initial release of version 1.0, CDP will provide live, on-site training and remain on-site for at least first day of live use.
7. Maintenance – Once training is completed and the system is fully implemented, CDP will move product into maintenance, dealing with changes, fixes, and enhancements as they arise.



### ***Document Configuration Management***

All documentation will be created and maintained in Microsoft Office 97-2003 file formats.

All documentation will be housed within the CDP Microsoft SharePoint® web-publishing platform. A Project Library and sub-library folders will be created to store document versions and provide real-time document editing/versioning control.

Document updates will be controlled through presentation, review and approval of the appropriate project team members. This could be the Steering Committee, CDP/Client Project Manager, etc. The CDP Project Manager and Technical Lead will share authority over the physical act of updating each document. CDP will proactively make the updated documents available to the Client.

### ***Change Management Plan***

This Change Management Plan describes the process for managing change in all CDP projects. Change is defined as a deviation from the specifications and/or requirements of the original Specification-Requirements Document (spreadsheet).

### ***Change Management Process***

The requirements and functional design agreed to as a result of project initiation and planning will be the scope baseline for any change and enhancement. Functionality not included in the Specification-Requirements Document will require a formal Change Request and follow suit with the procedure defined below. A refinement of a known requirement may result in the use of change management and additional cost if the refinement contains a change in purpose of said requirement (i.e. – results in an additional feature and/or

function). Ongoing evolutionary refinements of the requirements are natural and those which do not deviate from the original will be considered natural and will not require additional cost.

**\*\*\* CDP reserves the right to distinguish between changes that are naturally aligned with defined requirements and those changes that significantly alter the scope of the project.**

The Change Management Process consists of the five steps described below:

1. Definition

The first step in the change management process is the identification of a problem or the need for deviation from the requirements. Either CDP or the Client may identify a problem or need.

2. Documentation of the Change Request

The party identifying the deviation or need for change will document the deviation or change in writing to the other party. That documentation will consist of:

- Narrative description of the requested change
- Additional technical supporting material, as required
- Reason for the change requested
- Anticipated results if change is not made
- Estimated time required to implement the change
- Estimated impact on total resources required if change is implemented

The party identifying the change will present this documentation to the other party via email, fax, or in person.

3. Evaluation of Change Request

The Client and CDP will evaluate the change request individually. Not later than five (5) calendar days after notification of both parties, unless otherwise agreed by both parties, the parties will meet via conference call or in person to discuss the proposed change.

4. Approval of the Change Request

If both parties agree that the change should be made and on the terms of the change, the change shall be approved by signing the Change Request document. An email message confirming agreement to the change will suffice provided that the message clearly defines the change it is referring to and contains a statement approving the additional cost to complete the change. The approved Change Request will result in updates to the Project Management Plan.

5. Implementation of the Change

CDP will coordinate with the Client and implement, all approved changes and keep all stakeholders advised of the progress of the implementation.

6. Verification of the Change

Approved changes implemented in CDP's tasks and tested to verify that the change was implemented successfully.

### **Issue Management Plan**

*"...a detailed management approach to error resolution. "*

Issues that arise within the project due to competing requirements will be managed by the CDP Project Manager with the participation and authority of the Steering Committee. Competing requirements are resolved through a Project Core Team intervention and assessment of the issue. The appropriate team members will negotiate through to a solution which best complies with the business goals/objectives of the project and falls within scope.



Issues that arise within the system itself will be handled via error-reporting process for whatever QA phase the project is in at the time of discovery. CDP and the client successfully eradicate the large majority of system errors or “bugs” by employing a sound [Quality Assurance Plan](#). Issues that are found in the system, post-implementation, will follow the Customer Support SOP (see attachment 2 of this document)

### *Executing, Monitoring & Controlling (Development/Training/Implementation)*

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The Executing and Monitoring & Controlling phases involve managing the project team, doing the work and managing changes. The CDP Project Manager will lead the Project Core Team through the planning effort of all subsidiary Management Plans, which will be integrated into a cohesive whole. The effort of “doing the work” is simply executing the Project Work-Plan according to the formally approved schedule, following the plans to monitor and control the work being done. The Project Core Team guides the project stakeholders into defining exactly what is going to be done, what level of quality is required and how we will know when the project is finished.

### *Closing*

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Closing a project starts at the beginning of a project. CDP and the client work through Project Initiation and Project Planning to identify what the product will look like when it is complete and what efforts and agreements will constitute the end of the project. CDP and the client will begin the project with the end in mind.

Closure of the project is obtained from a successful implementation AND a formal acceptance of the product to the Specification-Requirements agreed to in the Project Planning Phase.

### *Deliverables Acceptance Plan*

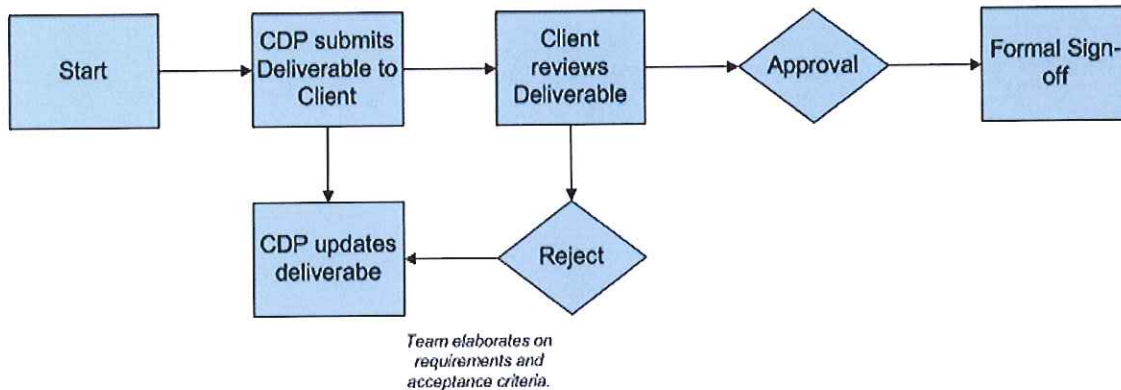
CDP requires high levels of participation from the client’s stakeholders. Early and heavy involvement of the expert stakeholders helps ensure deliverables acceptance. The expert stakeholders, equipped with the knowledge of the business needs, help CDP properly complete high quality deliverables; deliverables that meet and serve the needs of the client. Early participation guarantees informal acceptance of the deliverables early in the project lifecycle and each deliverable builds to the acceptance of the next deliverable.

### Deliverable Process Overview

A complete and final Specification-Requirements Document is formally signed off prior to the initiation of Development. The scope of work has been established and authorizes the project team for building the User Acceptance Testing Scripts and System Acceptance Criteria (Story Guide). Demonstrations-for-approval occur to review and accept the system’s functionality according to the acceptance criteria. User Acceptance Testing follows the established plan and the results, when approved, authorizes the initiation of Training and implementation efforts. Full execution of the Training Plan and approval to Go-Live leads to standing up the system.

The client approves the completion and initiation of everything based upon the results of the effort and projected plan for the next effort. By the time the formal sign-off meeting occurs, all deliverables have been approved except for the live system use. The client will sign off on a letter accepting the system product and its full implementation.

**Image 8 - Deliverables Acceptance Process**



### **Operations Management Plan Customer Support SOP**

The attached CDP Customer Support Standard Operating Procedure is the process and plan for turning the system over into full-time operations management.

#### **User Feedback**

Upon inclusion of the user feedback requirement into the contract, CDP will solicit for feedback for improvement. CDP will coordinate with a client Project Manager to distribute a survey to all client users. Survey questions shall be developed by CDP and approved by CDP and client Contract Administrators prior to survey distribution.

Results of survey will be submitted to the CDP Contract Administrator and CDP Operations Management Team for review.

#### **Definitions**

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##### **Project Core Team**

*This is the primary leadership team who champions, organizes and controls all project effort. The Core Team can be thought of as a steering committee in the trenches. The Core Team may or may not have executive level authority, depending upon the project.*

##### **Project Team**

*Project Team, in general, refers to the persons participating in the particular event or activity being referred to in the plan outline. When "CDP Project Team" is used, it is a reference to the Project Leads, Developers and other staffers participating in project work. When "Client Project Team" is used, reference to the Client Project Leads, expert stakeholders and other participants.*

##### **Stakeholder**

*Stakeholders are any persons who are affected by the project.*

**Expert Stakeholder**

*Expert stakeholders are the client's staff members who understand how the business must perform and can conceptualize how the software should support the business processes. These persons serve as the "voice" of the client and are typically the end-users of the system and end-user supervisor personnel.*

**CDP Technical Lead**

*The Technical Lead is the lead designer and chief architect of the system. This role is responsible for coordinating the work effort of the development team. The Technical Lead is a key role for defining the specification and design requirements of the product and accurately estimating the time and cost of developing the software product.*

**CDP Project Manager**

*The Project Manager is ultimately responsible for project integration and organizing all project components into a cohesive whole. The Project Manager is provided the level of authority to direct and manage all project efforts.*

**CDP Sponsor**

*The sponsor is the Executive Authority over the project. The sponsor is a strong champion for the project and has the authority to assure that the project has sufficient priority, funding, and staffing to enable success. The project sponsor sets the boundaries and expectations of authority for the Project Manager and the Technical Lead.*

**Steering Committee**

*Composed of Client and CDP Executive Authorities, Project Manager(s) and Technical Lead, the steering committee is responsible for ensuring that project goals, objectives and requirements are consistent with the client's strategic initiatives. The Steering Committee sets the tone for project control (scope creep, time, cost, etc.). The Steering Committee also maintains the responsibility of initiating a plan for terminating the project in worst case scenario(s).*

**Client Sponsor**

*The sponsor is the Executive Authority over the project. The sponsor is a strong champion for the project and has the authority to assure that the project has sufficient priority, funding, and staffing to enable success. The project sponsor identifies the process or participates and leads in deliverable acceptance. The sponsor enforces expectations of the acceptance criteria.*

**Client Project Manager**

*The Client Project Manager is responsible for organizing all client project efforts and managing a collaborative environment between CDP and the Client. The Client Project Manager is provided the level of authority to direct and manage all project efforts by the Client Sponsor.*

**Project Management Plan**

*The Project Management Plan is a compilation subsidiary management plans that are collectively integrated into one cohesive whole. The Project Management Plan is created by the Project Team in accordance with completing the tasks and activities that will satisfy the project's deliverables.*

**Management Plan**

*A management plan is a road map for defining the planning, executing and controlling efforts of each component of the project. For example, a Communication Plan identifies when and how the project stakeholders will communicate throughout the project. A Risk Management Plan defines how the team will identify and plan against potential impending risk events. Management plans are components of the Project Management Plan.*

## **Project Work-Plan**

*The Project Work-Plan is a deliverable oriented document that defines all work and tasks that must be completed for the project. The work plan overview establishes the relationships between all tasks and enables an accurate project schedule. Creating the Project Work-Plan is one of the most intense resource efforts of the project. ALL persons with an active role must participate and contribute to the planning effort of getting the work done.*

## **Task Definitions**

*Task Definitions are pages of detailed descriptions of the work that must be performed to complete the deliverables. Task Definitions provide a full complete picture of where each piece of work fits into the overall project. Task Definitions become a source for a Work Authorization System when the project work is initiated.*

## **RACI Matrix**

*A RACI Matrix is a spreadsheet tool. A RACI Matrix is completed in conjunction with the Project Work-Plan and it serves the team by coordinating communication efforts among all "need-to-know" roles in accordance with each task. A RACI Matrix prevents information from slipping through the cracks.*

## **Risk Watch List**

*A Watch List is a list of non-critical risks that have been analyzed by the project team and determined to be low probability/low impact. The list is kept and monitored by the Project Manager with the help of the project team throughout the life of the project.*

## **User Acceptance Testing**

*UAT is performed at the completion of development, quality assurance pass ratings and informal approval of the system functionality via Demonstrations-For-Approval. The UAT effort is directed by the Project Core Team, while the testing effort is performed by the Client's Expert Stakeholders. UAT seeks to measure the quality of the system in terms of "fitness-for-use" and to verify the system will support the business. UAT results are measured against the acceptance criteria of the pre-approved use cases defined in the Story Guide.*

## **Contract Administrator**

*CDP or Client personnel responsible for contract adjustments and contract renewals.*

## **Formal Approval**

*A signature or letter from an authorized Executive Authority formally acknowledging completion.*

## **Maintenance and Support Program**

CDP will provide continuing software support in making changes to the application packages. Any changes made due to application software errors will be made at no expense to the customer. Changes made due to customer preference will be charged at the current rate in effect for such services, which charge shall be agreed to in writing between supplier and customer prior to the making of such changes.

CDP provides you with maintenance and support of your CDP Applications for the life of the contract. You benefit from:

- Major product and technology releases
- Technical support
- Updates, fixes, security alerts, and critical patch updates
- Regulatory updates
- Upgrade scripts

With CDP's SaaS (Software as a Service) model, you know up front and with certainty how long your CDP Systems are supported. CDP's Policy provides access to technical experts for as long as you license your CDP software.

Simple, predictable, flexible, and the most comprehensive support policy available, CDP's Training & Support Team helps drive your success. CDP's support policy covers your entire technology environment, from database to middleware to application.

When you entrust your enterprise software development and support to CDP, your Enterprise Health Systems are secure. CDP invests heavily in the research and development of our products to further reduce total cost of ownership of our products. This enables us to improve the scalability, global functionality, business-process and high-volume performance of our products and to help you adopt the latest technologies, best practices and industry processes that drive your success.

CDP will make available to the client any and all enhancements to the software application. The enhancements shall be added to and become part of the license for all purposes. Enhancements will be offered and made available according to CDP's contract in effect. The enhancements referred to are those enhancements that are initiated by CDP and provide continual improvements for the purpose of maintaining timely applicability and competitive marketability of the system(s).

CDP lets you stay competitive, with the freedom to upgrade your applications on your timetable. Such enhancements do not include new processing and reporting modules that CDP is marketing and selling at established rates. If the licensee chooses to subscribe to these new products at agreed to rates, the enhancements shall be added and become part of the license for all purposes as herein provided.

The fees and charges for services stipulated herein are subject to revisions for any changes the customer may make in its requirements, or for any additional services that may be required. The fees or charges for such additional services will be agreed upon in advance by Customer and Supplier.

CDP's methodology for managing anticipated and unanticipated workload variances include (but not limited to) the following:

- Slow or stop any non-essential processing
- Run extra workloads at non-peak times when possible
- Prioritize workloads and assign higher priority to most critical tasks
- Increase capacity with upgraded system memory or processors
- Long Term – Distribute load over additional server hardware

Continuing coordination is a critical aspect of this and any implementation and requires frequent, regular, and open communications between CDP's project manager and the client. CDP has learned through hundreds of engagements that communication is often the single most important variable in promoting the successful on-time and on-budget completion of an intensive planning project.

CDP will provide a toll-free support hotline that will be available minimally from 8:00AM EST to 5:00PM EST Monday thru Friday. Users will also be able to send e-mail to support staff if they so choose. This support comes at no additional charge. Users may call as much as necessary. CDP's policy is that when a customer calls our office, they **always** talk to a real person. Although you may be transferred to someone's voice mail, you will always be given the option to return to the receptionist for further assistance. CDP's Help Desk functions include:

- Explanation of procedures and edits in the computer programs
- Explanation of error messages
- Maintain reports on programming errors and fixes

- Documentation updates

CDP Help Desk  
951 Industrial Road  
Frankfort, KY 40601  
Toll Free: 1-866-237-4814

In addition to the expanded business hour support as noted above, CDP's Romeoville office/data center is staffed 24/7 (with the exception of two major holidays). During this after hours 24/7 support, other CDP personnel can be contacted in the event questions and/or issues can't be resolved by after hour staff.

CDP provides all customers the same level of support. Customer support is something CDP excels at every day. We take pride in providing an extraordinary level of support for all of our customers.

A sampling of reference letters can be found below and many more can be found on our website at: <https://www.cdpehs.com/customers.asp>

CDP's environmental software is web-based. Upgrades and enhancements will be available as soon as the product is changed. Users of the system will be given prior notification and training documentation to support all enhancements and upgrades.

User group meetings are typically held annually in mutually agreed locations.

CDP utilizes tools such as GOTOMEETING, thus enabling real-time, multimedia communication. This service allows CDP to actually view your desktop remotely in order to resolve problems. It also allows CDP and your department to share support information such as documents, user manuals, presentations, and software applications. If a CDP technician is needed to help resolve a problem at your site, one will be dispatched as quickly as possible. Problems that are encountered with the CDPims software will not require a physical patch to an individual PC since the software is accessed through a web browser. Any patches made to the software by CDP will be seamless and will not involve individual users or computers.

CDP will conduct one-day on-site training sessions at the identified district offices as describe in the RFQ. CDP training sessions will include all tasks associated with the inspection management system. Training will consist of workshops and hands-on sessions (by on-site CDP personnel) to ensure that both users and administrators can perform all relevant tasks by the system go-live date. Additionally, CDP will train designated health department staff members so they may serve as trainers in the future if desired.

CDP will provide the client's staff with on-line help, user manuals, training manuals and continuous hands-on assistance as needed. The user and training manuals will be created in a reproducible format (PDF). The client's staff may also contact CDP via a toll free phone number or by e-mail. The telephone and e-mail support will be available minimally from 8:00AM EST to 5:00PM EST Monday thru Friday and are at no additional charge to the client.

### **Warranty**

The Supplier warrants that the Services will be performed in a professional and workman like manner consistent with industry standards reasonably applicable to such services. If the Client considers that a breach of this warranty has occurred and notifies the Supplier in writing stating the nature of the breach, then the Supplier will be required to urgently correct any affected services in order that they comply with the warranty.

Supplier shall not be responsible for any delay in processing or in the delivery of processed data caused by strikes, walkouts, riot, war, governmental regulation, fire, equipment malfunction, communications line failure, power failure, acts of God, or other causes beyond Supplier control. In the event any errors in the processed data result from Supplier's performance hereunder, Supplier will correct such errors at its own expense. Except as otherwise provided herein, it is expressly understood and agreed between Customer and Supplier that the total liability, if any, of Supplier for errors and/or omissions in data shall be limited to the monthly charge for each specific service(s) in error to the Customer as provided herein. Except as otherwise provided herein, Supplier and Customer expressly agree and understand that Supplier shall not be liable for any special, consequential, exemplary or punitive damages for any act which occurs under or arises from this AGREEMENT or its performance.

### **License Agreement**

This Agreement does not provide Client with title or ownership of the Licensed Program, but only a right of limited use. You must keep the Licensed Program free and clear of all claims, liens, and encumbrances.

You may not use, copy, modify, or distribute the Licensed Program (electronically or otherwise), or any copy, adaptation, transcription, or merged portion thereof, except as expressly authorized by Licensor. You may not reverse assemble, reverse compile, or otherwise translate the Licensed Program. Your rights may not be transferred, leased, assigned, or sublicensed except for a transfer of the Licensed Program in its entirety to (1) a successor in interest of your entire business who assumes the obligations of this Agreement or (2) any other party who is reasonably acceptable to Licensor, enters into a substitute version of this Agreement, and pays an administrative fee intended to cover attendant costs. No service bureau work, multiple-user license, or time-sharing arrangement is permitted, except as expressly authorized by Licensor. You may not install the Licensed Program in any other computer system or use it at any other location without Licensor's express authorization obtained in advance (which will not be unreasonably withheld); provided that you may transfer the Licensed Program to another computer temporarily if the computer specified in this Agreement is inoperable. If you use, copy, or modify the Licensed Program or if you transfer possession of any copy, adaptation, transcription, or merged portion of the Licensed Program to any other party in any way not expressly authorized by Licensor, your license is automatically terminated.

### **Source Code**

CDP will place the new software products with an established escrow agent. The client shall continue to be the beneficiary of the software being held by the escrow agent. CDP shall be the sole owner of the new software products, except that the customer shall have a perpetual license to use the software subject to the terms as follows:

*If CDP should fail to provide satisfactory service levels or cease service, and, upon written notification of such unsatisfactory performance to CDP and CDP's failure to correct such performance, the client may request and shall be given the software systems on a perpetual licensing arrangement with CDP. License fees shall then be established on a fair and equitable basis between the parties once CDP has developed the new systems and determines its total investment in each system.*

### **Business Resumption Plan Overview**

CDP has developed a Business Resumption Plan to ensure that, in the event that the CDP Romeoville computer center is rendered inoperable; operations can be smoothly transitioned to the CDP Frankfort disaster recovery site within a 48-hour timeframe.

Disaster recovery servers with identical backup devices are on standby in both Frankfort and Romeoville. All operating system and utility software source media and documentation reside at both locations.

Data and application files, as well as communication configurations, are backed up each night on tapes. These tapes are then taken to an off-site location that will always house the two most recent generations of backup

tapes. All files of archived data are created on tapes. A copy of these tapes is made at the time of creation and sent to the Frankfort site. The Frankfort site will always have the current tapes of any historical information needed for application processing.

CDP has a WEB application server that resides in their Frankfort, Kentucky facility. This server is backed up nightly by using Acronis Imaging software. This image can easily and quickly be copied to a hot swappable server already on location at the Frankfort facility; this can be done in a matter of minutes. In addition, this image is copied nightly to a server residing in CDP's Romeoville, Illinois facility, thus providing added security in the event of a disaster that renders the Frankfort facility inoperable.

CDP implemented Data Guard, a feature of Oracle Database 10g for maintaining standby databases, which are automatically kept synchronized with the production database, enabling fast failover when a production outage occurs. This ensures that data remains online, even in the event of an unplanned outage. Data Guard also enables productive use of standby databases.

All CDP's web applications have been moved to a web farm. The web farm concept includes, a minimum of three web servers in Frankfort, Kentucky running at all times with one hot spare in place in case of hardware failure, plus an offsite hot spare will be in place at the Romeoville, Illinois office in case of a site disaster or data line outage. Each server will balance client requests based on the volume of traffic on each server. The web farm concept allows CDP to have rapid recovery from any point of failure.

The CDP Romeoville staff has been divided into two teams. In the event of a disaster, several "North Transition Team" members will be the first to arrive in Frankfort and will be responsible for loading out application and data files, bringing up the system, and establishing the "on-line" environment. Remaining members of the "North Transition Team" will leave Chicago within 24 hours of the departure of the initial group and will handle the scheduling, operations, and general customer support, once CDP South is operational. The CDP Romeoville "Home Team" will stay in the Chicago area and initially be responsible for making airline, rental car and hotel reservations for the "North Transition Team" members. All other CDP North personnel will remain on standby status.

CDP Frankfort will have a "Transition Team" responsible for the initial preparation of the Frankfort site and the FlexServe communications switch from Romeoville to Frankfort. All other CDP South personnel will be notified of the situation. Once the CDP South site becomes operational and CDP "North Transition Team" members have arrived at CDP South, users will be notified via email that CDP North is temporarily down, that CDP South is operational, and that all customer support needs should be directed to a specified phone number at CDP South.

The CDP Business Resumption Plan notebook contains a checklist of chronologically ordered procedures to be performed in the event of a disaster. Additionally, detailed instructions relating to each procedure, vendor contact information, CDP personnel information, and priority schedules are included in cross-referenced appendices within the same notebook.

The CDP Business Resumption Plan is tested at a minimum of every twelve months. Server up-time is 99.990% over the last five years during normal operating hours.

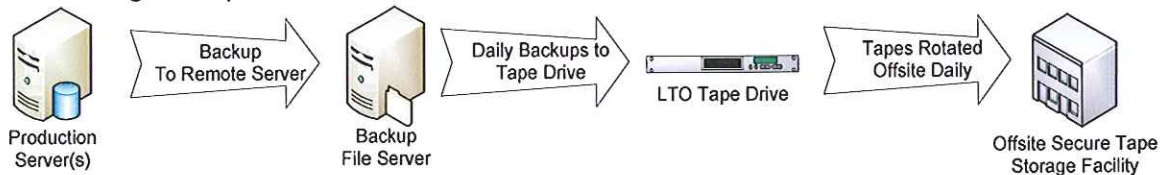
Supplier agrees that Customer shall, at all times, before, during or after the term of this AGREEMENT, have access to the files of Customer while files are in the custody of Supplier. This right shall be deemed to survive the term of this AGREEMENT. Supplier's obligation to retain said files shall be limited to a term of three (3) months following termination of this AGREEMENT. Health Department may for any reason, at its option, terminate this agreement in its entirety or as it applies to any service(s) described herein at any time provided the contractor receives thirty (30) days notice in writing.



## CDP Backup & Recovery Overview (this can be customized to specific needs):

### Backup Approach

Using the built in database server backup tools and third party software, CDPs' servers are backed up daily. This backup file is stored on a remote file server that is independent of the CDP production servers. This file server has its archive of backups written to a set of tapes daily. The tapes are sent offsite the following day to a secure offsite storage facility.



### Backup Schedule

- Server backup – Daily, 6PM ET
- File Server Tape Backup – Once Daily at 7AM ET, Monday thru Friday
- Offsite Tape Rotation – Once Daily at 11AM ET, Monday thru Friday

### Disaster Recovery

The offsite tapes will be the primary means to recover the data in the event of a disaster at our primary facility. CDP maintains another data center facility located in Romeoville, IL that will be used as the primary disaster recovery site. The following steps will be required to complete a recovery...

- 1) Transport tapes to our backup facility in Romeoville IL
- 2) Use the available hot spare server, or procure a new server to act as the recovery server depending on the requirement
- 3) Install the operating System on the new server if required
- 4) Install any application software on the new server if required
- 5) Recover the most recent backup file from the tape
- 6) Restore the backup file onto the server
- 7) Test server functionality
- 8) Test network connections via Disaster Recovery path
- 9) Update client connections to the new server if needed
- 10) Release for production

**References including contract lengths:**

Ms. Kathy Fowler, Interim Director  
Division of Public Health Protection and Safety  
Kentucky Department of Public Health  
502-564-7398, ext. 3716  
Home Healthcare implemented 1981  
EH state-wide system implemented 1983  
Clinic state-wide system implemented 1990  
WIC state-wide implemented 1992  
EBTWIC state-wide implemented 2011

Mr. Kelly Nielson  
Director, Division of Administrative Services  
Salt Lake Valley Health Department  
2001 South State Street, S3800  
Salt Lake City, UT 84190-2150  
801-468-2806  
[knielson@slco.org](mailto:knielson@slco.org)  
Clinic system implemented 1995  
EH system implemented 2008

Mr. Bob Whitwam  
Environmental Health Director  
Forsyth County Health Department  
799 Highland Avenue  
Winston-Salem, NC 27102  
336-703-3139  
[whitware@forsyth.cc](mailto:whitware@forsyth.cc)  
Clinic system implemented 1995  
EH system implemented 1999

Mr. Wil Hayes (former EH Director of Knox County where the EH System was implemented in 2007)  
Director, Environmental Health  
Peoria City/County Health Department  
2116 N. Sheridan Rd  
Peoria, IL 61404  
309-679-6160  
[whayes@peoriacounty.org](mailto:whayes@peoriacounty.org)  
EH system implemented 2009

Mr. Tom Seckler  
Operations Manager  
Peoria City/County Technology Department  
324 Main Street, Room G-11  
Peoria, IL 61602-1319  
309-672-6961  
[tseckler@peoriacounty.org](mailto:tseckler@peoriacounty.org)  
EH system implemented 2009

**Current client information serviced by CDP:**

- Total number environmental health inspections for 2010-8/31/2011: 604,493
- Total number of establishments entered in 2010: 24,044
- Total properties entered in 2010: 22,172
  
- Average data queried by users 300,000 bytes per second
- Average number of update/insert of records by users 375 per hour

Totals for North Carolina Environmental Health:

NC Establishment	56,465
NC Inspections	1,100,840
NC Properties	44,510
NC Users	416

Totals for Illinois Environmental Health:

IL Establishment	18,185
IL Inspections	108,982
IL Properties	22,975
IL Users	167

Totals for Utah Environmental Health:

UT Establishment	32,192
UT Inspections	177,485
UT Properties	13,593
UT Users	246

Totals for Kentucky Environmental Health:

KY Establishment	54,532
KY Inspections	1,828,671 * from 7/1/2005 (prior inspections are archived on tape)
KY Properties	91,708
KY Users	437

**Illinois Counties**

Cook  
Knox  
Lee  
Madison  
Peoria  
Sangamon

**Idaho Districts**

Eastern Idaho Public Health District  
Panhandle Health District  
Southeastern District Health District

**State of Kentucky**

All 120 counties in the state

**Utah Districts**

Bear River District Health Department  
Central Utah Public Health District  
Salt Lake Valley Health Department  
Southeastern Utah District Health  
Tooele County Health Department  
Utah County Health Department  
Wasatch County Health Department

Indian Health Services - Environmental Health

**North Carolina Counties**

Alamance County  
Beaufort County  
Brunswick County  
Catawba County  
Chatham County  
Clay County  
Craven County  
Dare County  
Davidson County  
Davie County  
Durham County  
Forsyth County  
Gaston County  
Harnett County  
Iredell County  
Jackson County  
Lincoln County  
Macon County  
Madison County  
Orange County  
Richmond County  
Robeson County  
Rowan County  
Rutherford-Polk-McDowell District  
Scotland County  
Surry County  
Transylvania County  
Wilkes County  
Yadkin County

## Attachments

- Signed RFQ
- Signed Addendum #1
- Signed Addendum #2
  - Bid Sheet-revised version
- Signed Addendum #3