



Request for Qualifications

For Data Visualization and Information Design Partners

Initial RFQ Posting: October 12, 2017

Deadline for Questions: Five business days prior to the next submission deadline

Submission Deadline: Applications will be reviewed quarterly, with the deadline for submission for each review at 3 p.m. Eastern Time on the 15th day of the preceding month:

- February 15 for review in March/April
- May 15 for review in June/July
- August 15 for review in September/October
- November 15 for review in December/January

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Definitions

Unless the context indicates otherwise, the following capitalized words are defined as follows for purposes of this RFQ:

1. Agreement: A contract negotiated between Allegheny County and the Qualified Applicant to provide the Contract Services
2. Allegheny County: A home rule county and political subdivision of the Commonwealth of Pennsylvania
3. Applicant: The individual, non-profit organization, or for-profit organization or business submitting an Application in response to a RFQ
4. Application: The response submitted to a RFQ
5. Contract Services: The specific services which the Qualified Applicant agrees to provide to the County in response to this RFQ as more particularly described in the Scope of Services in the Agreement
6. DHS: [Allegheny County] Department of Human Services
7. Qualified Applicant: The Applicant(s) determined by DHS to be qualified to be selected for specific assignment(s)
8. Response Form: The Word document in which Applicants respond to requested information about this RFQ
9. RFQ: Request for Qualifications

The RFQ at a Glance

Purpose

The Allegheny County Department of Human Services (DHS) uses data visualizations to complement content in research publications and interactive dashboards to support IT applications. Through this Request for Qualifications (RFQ), DHS is interested in developing a partnership with one or more experts in data visualization and information design. Applicants may seek to be qualified for one or both of the following: 1) to design simple visualizations to complement research publication content (simple design) and 2) to develop complex dashboards with multiple screens and layers (complex development).

From January 2016 to October 2017, DHS opened the *RFQ to Create Tableau Visualizations to Enhance Data Dissemination* for applications, which qualified applicants to create data visualizations only in Tableau. Now, DHS wishes to expand its pool of qualified applicants to include those that can create visualizations and dashboards in free and open source solutions as well as Tableau.

Applicants qualified through the *RFQ to Create Tableau Visualizations to Enhance Data Dissemination* do not need to reapply under this RFQ.

Award Details

There is no guarantee of selection for specific projects as a result of qualification. If a Qualified Applicant is selected for a specific assignment project, an Agreement will be negotiated to provide the Contract Services.

Who can apply

All entities, including but not limited to, education organizations, non-profit organizations, for-profit organizations, small businesses and individuals, are eligible to submit an Application in response to this RFQ. Entities do not need to have an existing contract with Allegheny County but must meet all of Allegheny County's contractual requirements (see Section 6: Contract Requirements for Qualified Applicants) and have the programmatic, financial and staffing capability to provide the Contract Services.

What we don't want

We are not interested in bids for specific contracts but rather statements of qualifications from Applicants flexible enough to be available when needed but not dependent upon a guaranteed number of hours or projects.

What's important to us

We are most interested in Applicants with an understanding of and expertise in data visualization and information design. Experience designing in Tableau is preferred, but not required, as is interest in the mission of DHS or the field of human/social services. Applicants may use one of the many available open source solutions to create visualizations, but DHS will not be purchasing additional software as part of this RFQ. For certain projects, a local presence may be important.

Applicants must be able to work collaboratively with data analysts and other DHS staff and end users to gather requirements. Applicants must be able to communicate knowledge of data visualization software in an easily-understandable way, be reasonably available and able to respond to both quick turn-around and long-term projects, and flexible enough to work well in an environment where things may change frequently or stall for periods of time.

Applicants must be diligent about documentation and knowledge transfer.

In addition, Applicants must be able to design to various interfaces and multiple platforms.

Timeline

The deadline for Applicants to submit questions about this RFQ is five business days prior to the next submission deadline (e.g., to ensure that your question is answered by February 15th, you must submit your question five business days prior to February 15th).

Applications may be submitted at any time and will be reviewed quarterly, with the deadline for each review at 3 p.m. Eastern Time on the 15th day of February, May, August and November. The review will occur over the following two months (e.g., you must submit by February 15th for your Application to be considered for the March/April review).

Who we are

On behalf of Allegheny County, DHS is the issuing office for this RFQ.

DHS is the largest department of Allegheny County government and provides publicly-funded services to more than 200,000 people annually, in areas including child welfare, behavioral health, aging, intellectual disability, homelessness and community services.

More information about DHS is available at <http://www.alleghenycounty.us/human-services/index.aspx>

Section 1: Why We Are Issuing this RFQ

DHS has a national reputation for innovative uses of data for information-sharing, decision-making and risk assessment. The foundation of DHS's data capability is the DHS Data Warehouse, a centralized electronic repository of social services data that integrates 29 sources, both internal and external to DHS. External data sources originate from partnerships with organizations such as the following: the Allegheny County and City of Pittsburgh housing authorities, local school districts, the City of Pittsburgh Bureau of Police and the Allegheny County Health Department. The Data Warehouse is Oracle-based and managed through an IT partner. The Data Warehouse has more than one billion records from more than one million unduplicated clients. These data allow for tracking and analysis of client, program and system involvement and outcomes.

DHS is interested in increasing the use of data visualizations, both as an enhancement to specific publications and for management reporting, and has selected Tableau as one among several different reporting tools. While use of Tableau to create data visualizations is not required, DHS will not be investing in additional software as part of this RFQ. DHS will consider a free and open source solution for the purposes of creating visualizations and dashboards.

Section 2: What We Are Looking For

DHS plans to create a pool of Qualified Applicants who may be selected to prepare data visualizations on an as-needed basis. We are doing this because the need for such capacity will vary over time and we are interested in Applicants who are flexible enough to be readily available when needed but not dependent upon this work for their livelihood.

Applications may be submitted to become qualified for one or both of the following:

1. **Simple Design:** Development of simple, well-designed data visualizations to accompany and illustrate the information within a research publication posted on the DHS website.
 - DHS research publications may be viewed at <https://www.alleghenycountyanalytics.us/>
 - Examples of how DHS has used Tableau visualizations to support/enhance research publications can be found at <https://www.alleghenycountyanalytics.us/index.php/category/type-of-report/visualizations/>
2. **Complex Design:** Development of complex dashboards with numerous metrics and multiple screens.
 - For example, we might request development of a dashboard supporting all reporting needs for a case management system bridging multiple services. In that case, the audience would include funding and regulatory entities requiring specific reports, DHS staff making data-informed decisions about practice and policy, and analysts preparing reports for publication.
 - A second example is the development of a dashboard that demonstrates individual progress based on assessments and/or case plans over time. The audience for this dashboard would include caseworkers and service coordinators, program managers and individual clients.

- A third example is visualizations of demographics/characteristics of individuals active in child welfare on any given day. This would have a wide audience and be available (in a de-identified fashion) to the general public.

Visualizations may represent any of DHS’s program areas (e.g., aging, behavioral health, child welfare, community services and intellectual disabilities) as well as related areas such as health, education, community development and criminal justice.

Visualizations will be hosted on the DHS Server. DHS will provide Qualified Applicants selected for a specific data visualization project with access to a license to use Tableau and the Tableau server during visualization development if this is the Applicant’s software of choice. Qualified Applicants will be expected to:

- Work with DHS analysts to understand needs and requirements.
- Produce clean files and documentation that will support transfer of learning, so that DHS staff can maintain visualizations once created.
- Undergo DHS’s QA process to demonstrate the integrity of the data manipulations.

Audiences may include internal DHS staff and leadership, DHS-contracted providers, external partners, others with an interest in the work of DHS and – in the case of website-published visualizations – the general public.

Section 3: Application Requirements and Evaluation Criteria

Applicants must meet the following evaluation criteria and must address their qualifications by responding to the specifically-requested items or questions in the Response Form. Applicants should download and type their responses directly into the Response Form available on the Active Solicitations webpage at www.alleghenycounty.us/dhs/solicitations. The maximum score that an Application can receive is 45 points for Simple Design and 55 points for Complex Development, as outlined in the following sections.

A. All Applicants (30 points possible)

- Experience with Tableau and/or a free and open source data visualization solution, including advanced calculations and parameters, data manipulation and dashboard actions (5 points)
- Ability to manage time and ensure responsiveness and timeliness (5 points)
- Ability to work across multiple data sources, using data blending or joins to integrate the data (5 points)
- Experience with creating dynamic maps, including maps with custom layers that summarize data at geographic levels not provided by a data visualization solution (5 points)
- Knowledge of basic design principles, including your experience, examples and/or training (5 points)
- Ability to create innovative products while staying within the constraints of DHS’s standard color/font scheme (5 points)

B. Simple Design Applicants (15 points possible)

- Experience integrating graphics with reports (online), retaining interactivity within this context (5 points)

- Example(s) of Simple Design data visualization work completed independently and completely by the Applicant as well as (optional) an example of work to which the Applicant contributed. Descriptions of the examples must be included. The example(s) must demonstrate the Applicant’s knowledge of design and technical ability. (10 points)

C. Complex Development Applicants (25 points possible)

- Experience working with a data warehouse (5 points possible)
- Experience creating dashboards from live data tables, not just data extracts (5 points possible)
- Experience with performance optimization techniques, allowing for efficient data manipulation that does not slow dashboard function for the end user (5 points possible)
- Example(s) of Complex Development data visualization work completed independently and completely by the Applicant as well as (optional) an example of work to which the Applicant contributed. Descriptions of the examples must be included. The example(s) must demonstrate the Applicant’s knowledge of design and technical ability. (10 points)

Section 4: How to Submit an Application

4.1 Submission Process

- Applicants should take time to review and understand the RFQ in its entirety including:
 - The background (see Section 1: Why We Are Issuing this RFQ)
 - The narrative (see Section 2: What We Are Looking For)
 - The requirements (see Section 3: Application Requirements and Evaluation Criteria)
 - The evaluation process (see Section 5: How We Will Evaluate Your Application)
- Applicants must use the Response Form to develop your Application. Type your responses to each requested item directly into the Response Form. It is available at our Active Solicitations website with the RFQ announcement at www.alleghenycounty.us/dhs/solicitations.
- Applicants must submit a complete Application, which includes the following attachments that are available on our Active Solicitations website:
 - Response Form
 - MWDBE documents
 - Allegheny County Vendor Creation Form
 - Audited financial reports for the last three years
 - W-9
- Applicants should not send any attachments other than those listed above and on the Response Form.
- If you do not have audited financial reports for the last three years, you may submit other financial documentation that attest to the financial health of your organization. Tax returns are the preferred alternative. Please note that providing financial documentation is a requirement of contracting through Allegheny County.
- Make sure to complete each section of the Response Form and to stay within any word counts or page limits that may be specified in the Response Form.
- Applications must be submitted electronically to DHSProposals@alleghenycounty.us no later than 3:00 p.m. Eastern Time on the 15th day of February, May, August and November to be considered for that review.**

- h. Please make sure to get your Application in before the deadline! If your Application is late, it will be rejected and will not be presented to the evaluation committee for review and scoring as described in Section 5 below.
- i. You will receive an email when your Application is received. If you do not receive this notification within 48 hours of submitting your Application, please contact DHSProposals@allegHENYcounty.us

4.2 How to Contact DHS about this RFQ

- a. All inquiries and questions must be submitted via email to DHSProposals@allegHENYcounty.us
- b. All information about the RFQ, including answers to questions, changes and clarifications will be posted at our Active Solicitations website at www.allegHENYcounty.us/dhs/solicitations
- c. Please be sure to check this website regularly for answers to questions, additional information or changes to the RFQ or the RFQ process.

4.3 Other Information

- a. The issuance of this RFQ does not obligate the County to enter into an Agreement with any Applicants. The County reserves the right to reject any and all Applications.
- b. Any Agreement originating from this RFQ is subject to all of the Terms and Conditions specified in Section 6: Contract Requirements for Qualified Applicants.
- c. Applicants are responsible for all costs related to the preparation and submission of a Application.
- d. Applications become the property of the County and may become part of any subsequent Agreement between the Applicant and the County.
- e. The Successful Application will be posted online in the DHS Solicitations Archive after an Agreement has been fully executed by the County and the Qualified Applicant(s).
- f. Applicants also should be aware that all documents and materials submitted in response to this RFQ are subject to requests made pursuant to Pennsylvania's Right-To-Know Law and that the County may have to make submitted documents and materials available to a requestor after an award of an Agreement is made.

Section 5: How We Will Evaluate Your Application

Applications will be evaluated by an evaluation committee convened by DHS. The evaluation committee will assign scores based on the evaluation criteria in Section 3: Application Requirements and Evaluation Criteria using the scale listed in Section 5.1 b.

5.1 Evaluation Model

The evaluation process will consist of the following steps:

- a. An Evaluation Committee will be formed by DHS and may consist of some or all of the following:

- Content experts from within DHS, selected for their expertise and/or experience
 - Representatives of foundations, educational institutions, community and civic organizations, businesses and/or non-profit agencies
- b. All Evaluation Committee members will individually review and score each Application. Each Evaluation Committee member will award points for each response on an Applicant's Response Form according to their expertise and best judgment of how the Application submitted by that Applicant meets the evaluation criteria in Section 3 using the following scale:
- 0 – Not addressed in Application
 - 1 – Poor
 - 2 – Below expectations
 - 3 – Meets expectations
 - 4 – Exceeds expectations
 - 5 – Outstanding
- c. The Evaluation Committee members then will meet collectively to discuss the individual scores and evaluations of each committee member.
- d. At any time during the review process, DHS may contact an Applicant to discuss any areas of the Application needing clarification or further explanation.
- e. The Evaluation Committee will submit their recommendation for award of an Agreement to the Director of DHS for his approval, who in turn will submit a request to the County Manager for approval for the County to enter into an Agreement with the Qualified Applicant(s).
- f. **The County is under no obligation to award or enter into an Agreement with an Applicant as a result of this RFQ. The County reserves the right to reject any and all Applications.**
- g. All Applicants will be notified of their status following the final determination of which Applicant(s) will be qualified.
- h. Applicants not awarded an Agreement who are interested in receiving feedback regarding their submission may request a phone call at DHSProposals@allegHENYcounty.us.

5.2 Other Requirements

For an Application to be eligible for evaluation, it must be:

- Received by the due date/time
- Properly formatted and include responses to all requested information
- Complete with all required forms and attachments

Applications which do not meet the above requirements will be automatically rejected and will not be presented to the evaluation committee.

Section 6: What Happens after an Applicant is Qualified?

6.1 County Obligation

Qualification is not a guarantee of a project. A Qualified Applicant may or may not be selected for any projects.

6.2 Selection Process

DHS may assign specific projects in one of two ways:

1. Projects may be sole-sourced to the most appropriate Qualified Applicant, based upon the following criteria:
 - Experience in the specific topic area
 - Evaluation scores
 - Availability and ability to complete the project within a designated time frame
 - Projected cost based on hourly rate and an estimate of hours required
 - When applicable, DHS's previous experience with the Qualified Applicant in a similar situation
2. Projects may be made through a task order process. Task orders will generally be used for more complex projects. If a task order process is used, details will be sent to all Qualified Applicants, along with a description of the evaluation/selection process.

6.3 Contract Award

Qualification through this RFQ does not necessarily mean that a Qualified Applicant will be awarded an Agreement with Allegheny County to complete a specific project.

After qualification by DHS, Qualified Applicants may be selected on an as-needed basis for specific data visualization projects. If selected for a specific project, Qualified Applicants will be required to enter into an Agreement with Allegheny County, on behalf of DHS, under which services will be utilized and reimbursed on an hourly basis.

Qualification obtained through this RFQ to provide data visualization support for DHS will be effective for two years with the potential for renewal at the discretion of the County. Any resulting Agreement with Allegheny County will be for a period not to exceed two years, with the possibility of an extension of the length of the Agreement at the discretion of the County.

DESCRIPTION	YEARS
Qualification	Two years with potential for renewal
Agreement	Will occur if Qualified Applicant is selected for specific Contract Services; Agreements may be for a term of up to two years
Options to renew the Agreement	Agreement renewal options will be determined at the time of the Agreement, with mutual agreement of Qualified Applicant and County

Section 7: Contract Requirements for Qualified Applicants

In order to enter into an Agreement with the County, Applicants must be willing to comply with all contract requirements listed below and all standard terms and conditions contained in a County contract for provision of services to DHS and its offices. Additional details about contracting with Allegheny County are provided in the [DHS Contract Specifications Manual](http://www.alleghenycounty.us/dhs/solicitations), available at www.alleghenycounty.us/dhs/solicitations.

7.1 Minority, Women or Disadvantaged Business Enterprise (MWDBE) Requirements

Allegheny County has MWDBE goals of 13% participation for Minority Business Enterprises and 2% participation for Women Enterprises, and expects that Qualified Applicants will make a “good faith effort” in assisting the County in meeting these goals.

- a. All Applications must include either of the following:
 - If your organization is able to meet the MWDBE contract goals, a completed MWDBE Participation Statement and MWDBE Contact Information form is required. You must also attach the MWDBE certifications of the firms you intend to use with the Participation Statement.
 - If your organization will request a waiver from participating in the MWDBE contract goals, a completed MWDBE Participation Statement, MWDBE Contact Information form and MWDBE Waiver Request are required.
- b. MWDBE forms and resources can be found at www.alleghenycounty.us/dhs/solicitations:
 - MWDBE Forms
 - [MWDBE Participation Statement](#)
 - [MWDBE Waiver Request](#)
 - [MWDBE Contact Information form](#)
 - MWDBE Resources
 - [MWDBE Contract Specifications Manual](#)
 - [MWDBE Response Checklist](#)
 - [Guide for completing the MWDBE Participation Statement](#)
 - [Sample Diversity Policy](#)
- c. For more information about MWDBEs, visit the [Allegheny County MWDBE website](#).

7.2 HIPAA Compliance

DHS is a covered entity under the Health Information Portability and Accountability Act (HIPAA). Therefore, a Qualified Applicant must comply with all HIPAA requirements.

7.3 Cyber Security

- a. Qualified Applicants must meet the minimum computer specifications which begin on page 14 of the [DHS Contract Specifications Manual](#), available at www.alleghenycounty.us/dhs/solicitations.
- b. All electronic devices must have sufficient security software and settings to minimize the risk of an information breach.
- c. Qualified Applicants must also have policies in place to ensure that electronic devices are physically secure when not in use (e.g., locked in a vehicle trunk, password protected).

7.4 Equal Employment Opportunity and Non-Discrimination Requirements

By submitting an Application, an Applicant agrees to not discriminate against any employee, applicant for employment, independent contractor, client or any other person on the basis of race, color, religion, national origin or ancestry, sex, gender identity or expression, sexual orientation, disability, marital status, familial status, age (40 or over), or use of a guide or support animal because of blindness, deafness or physical disability.