Request for Qualifications

To Create Tableau Visualizations to Enhance Data Dissemination

Initial RFQ Posting: January 26, 2016

Review Deadlines: Applications will be reviewed quarterly, with the deadline for submission for each review 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

Deadline for Questions: 5 business days prior to the next submission deadline

Allegheny County Department of Human Services
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The Basics

What we need

The Allegheny County Department of Human Services (DHS) recently began to use Tableau visualizations to complement analytic products and Tableau dashboards to support IT applications.

Through this Request for Qualifications (RFQ), DHS is interested in developing a pool of outside experts in the use of Tableau. Applicants may seek to be qualified for one or both of the following: 1) design simple visualizations to complement research reports (simple design) and 2) develop complex dashboards with multiple screens and layers (complex development).

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 seeking Applicants with expertise in Tableau development with a focus on design aesthetic. Interest in the mission of DHS or the field of human/social services is preferred. For certain assignments, 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 Tableau 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.

Who we are

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

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: Key Information

1.1   General Information

    a. This RFQ is an invitation to individuals, non-profit organizations, and for-profit organizations or businesses (Applicants) to submit an Application to become qualified to develop Tableau visualizations for DHS.

    b. No guarantee of selection for specific assignments is made as a result of qualification.

    c. However, if a Qualified Applicant is selected for a specific assignment, an Agreement will be negotiated to provide the Contract Services.

1.2   Definitions

The following words are used in this RFQ and are capitalized to indicate their special meaning:

1. Agreement: A contract negotiated between Allegheny County and the Qualified Applicant to provide the Contract Services.
2. Applicant: The individual, non-profit organization, or for-profit organization or business submitting an Application in response to this RFQ.
3. Contract Services: The specific Tableau services (Simple Design and/or Complex Development) included in the Agreement that the Qualified Applicant agrees to and may be selected to provide (see *Section 2: Our Requirements*)
4. Application: The response submitted to this RFQ
5. Qualified Applicant: the Applicant(s) determined by DHS to be qualified to be selected for specific assignment(s)

1.3   Timeline

    a. Application Submission: Applications may be submitted at any time and will be reviewed quarterly, with the deadline for each review on the 15th day of February, May, August and November. The review will occur over the following two months (i.e. submit by February 15 for your Application to be considered for the March/April review).

    b. Deadline for Applicants to Submit Questions: 5 business days prior to the next submission deadline to ensure that an answer is provided by the next submission deadline (i.e. to ensure that your question is answered by February 15th, submit your question 5 business days prior to February 15th).

1.4   How to Contact DHS

    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 http://www.alleghenycounty.us/Human-Services/Resources/Doing-Business/Solicitations-(RFP/RFQ/RFI).aspx

    c. Please be sure to check this website regularly for answers to questions, additional information, or changes to the RFQ or the RFQ process.

1.5   Submitting Your Application

a. This RFQ provides detailed information about Application and Applicant requirements, the evaluation process and how to develop your Application.
b. Applicants seeking to be qualified under this RFQ must submit a complete Application, which includes the following, available on our website at http://www.alleghenycounty.us/Human-Services/Resources/Doing-Business/Solicitations-(RFP/RFQ/RFI).aspx.
    - Response Form
    - Abbreviated Application
    - MWDBE documents
    - W9
    - Vendor Creation Form
c. Please do not send any attachments other than those listed above and on the Response Form.
d. Please take time to review and understand the RFQ, specifically:
    1. The requirements (see *Section 2: Our Requirements*)
    2. The evaluation process (see *Section 3: The Qualification Process*)
e. Make sure to complete each section of the Response Form and to stay within the word counts specified in the Response Form.
f. Applications must be submitted electronically to DHSProposals@alleghenycounty.us no later than 3:00 P.M. on the 15th of February, May, August or November to be considered for the next quarterly review.
g. Please make sure to get your Application in before the deadline! If your Application is late, it will not be considered until the next review period.
h. You will receive an email when your Application is received.
    1. If you do not receive this notification within 48 hours of submitting your Application, please contact us at DHSProposals@alleghenycounty.us

1.6   Other Information

a. This RFQ is subject to all of the Terms and Conditions specified in *Section 5: Contract Information*.
b. Allegheny County is not obligated to qualify any Applicants as a result of this RFQ.
c. Applicants are responsible for all costs related to the preparation and submission of their Application.
d. Applications become the property of the County and may become part of any subsequent Agreement between the Applicant and the County.

Section 2: Our Requirements

2.1   Background

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.

2.2   What we are buying and why

DHS plans to create a pool of Qualified Applicants who may be selected to prepare Tableau 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 Tableau visualizations to accompany and illustrate the information within a research report posted on the DHS website (simple design).
   - DHS research reports may be viewed at http://www.alleghenycounty.us/Human-Services/Resources/Research-and-Reports.aspx
   - An example of how DHS uses Tableau visualizations to support/enhance research reports can be found at http://pittsburghpa.gov/publicsafety/interactive-reports-intro

2. **Complex Design**: Development of complex dashboards with numerous metrics and multiple screens (complex development).
   - 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 – visualizations of demographics/characteristics of individuals active in child welfare on any given day – 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 Tableau assignment with access to a license to use Tableau and the Tableau server during visualization development, and 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.

2.3   What we require

In order to be qualified through this RFQ, all Applicants must meet the following criteria:
- Fluency with Tableau and its various uses, including advanced calculations and parameters, data manipulation and dashboard actions.
- Responsive and able to complete projects in a timely manner
- Experience with data blending or joins to integrate data from multiple data sources
- Ability to create dynamic maps, including maps with custom layers that summarize data at geographic levels not provided by Tableau (e.g., Census tract, municipality)
- Familiarity with and adherence to basic design principles, including, but not limited to, meaningful use of color
- Ability to innovative while staying within the constraints of DHS's standard color/font scheme

In addition, simple design Applicants must meet the following criteria:
- Familiarity integrating graphics with reports (online), and how to best retain interactivity within this context

In addition, complex development Applicants must meet the following criteria:
- Familiarity working with a data warehouse
- Ability to create dashboards from live data tables, not just data extracts
- Experience with performance optimization techniques, allowing for efficient data manipulation that does not slow dashboard function for the end user

Applicants should address their qualifications in regard to the above by completing the attached Response Form and including examples of work that were done independently and completely by the Applicant as well as (optional) examples of work to which the Applicant contributed, with a clear description of the Applicant's contribution to the work. The Response Form will specify Application format and maximum word count.

Section 3: The Qualification Process

3.1   Evaluation Model

The qualifications of all Applicants will be evaluated by an evaluation committee created by DHS. The evaluation committee will assign scores based upon evaluation criteria specified in *Section 2.2 What we are buying and why* and *2.3.What we require* and further identified in the Response Form. While an hourly rate is requested in the Response Form, it is not a qualification criterion, although it may be considered when specific projects are assigned. Applicants seeking to be qualified for both RFQ components may provide separate rates for each. If you have a range of costs for various services, please prepare a blended rate and a description of how that rate was determined.

3.2   Evaluation Process

The evaluation process will consist of the following steps:

   a. An evaluation committee will be formed by the DHS and will consist of some or all of the following:
        1. DHS data analysts and content experts from within DHS, selected for their expertise and/or experience
        2. DHS administration
        3. Representatives of foundations, educational institutions, community and civic organizations, businesses and/or non-profit agencies
        4. Tableau experts not being considered under this RFQ
   b. Each member of the evaluation committee will sign a confidentiality and conflict of interest agreement.
   c. All committee members initially will separately and individually review and score each Application.
   d. References will be checked for each Applicant.
   e. The evaluation committee members then will meet collectively to compile the individual scores of each committee member.
   f. Following the meeting, a list will be prepared of all Applicants who have met the evaluation criteria.
   g. Applicants may be asked to submit additional information or to present to the evaluation committee in order to confirm their qualifications.
        1. If this step occurs, Applicants will receive detailed instructions and sufficient time for preparation.
        2. The evaluation committee will score additional information or presentations using the same process as described in *3.2: Evaluation Criteria, sections d through f.*
   h. A list of recommended Qualified Applicants will be submitted to the Executive Director of DHS for his approval. This list may include all, some or none of the Applicants. The County is under no obligation to qualify any Applicants.
   i. All Applicants will be notified of their status following the final determination.

3.3   Other Requirements

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

- Received by the due date/time to be considered for the next quarterly review
- Properly formatted and include answers to all questions
- Include all required forms and attachments

Applications that do not meet the above criteria will not be considered.

Applicants will be evaluated against the criteria specified in *Section 2.3: What we require* using the information requested in the Response Form and any additional information subsequently provided during the evaluation process.

Section 4: What Happens after an Applicant is Qualified?

4.1 County Obligation

Qualification is not a guarantee of assignment of specific assignments. A Qualified Applicant may or may not be selected for any assignments.

4.2 Selection Process

DHS may assign specific assignments in one of two ways:
1. Assignments 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 assignment 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. Assignments may be made through a task order process. Task orders will generally be used for more complex assignments. If a task order process is used, details will be sent to all Qualified Applicants, along with a description of the evaluation/selection process.

4.3 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 assignment.

After qualification by DHS, Qualified Applicants may be selected on an as-needed basis for specific Tableau assignments. If selected for a specific Tableau assignment, 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 Tableau 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 not to exceed 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 5: Contract Information

In order to engage in an Agreement with the County, you must comply with all contract requirements listed below. Additional details about contracting with Allegheny County are provided in the DHS Contract Specifications Manual, available at http://www.alleghenycounty.us/Human-Services/Resources/Doing-Business/Solicitations-(RFP/RFQ/RFI).aspx.

5.1   Minority, Women or Disadvantaged Business Enterprise (M/W/DBE) Requirements

Allegheny County has MWDBE goals of 13% participation for Minority Business Enterprises and 2% participation for Women and Disadvantaged Business Enterprises, and expects that Successful Proposers will make a "good faith effort" in assisting the County in meeting these goals.

- a. All Proposals must include either of the following:
    - a. If your organization is able to meet the MWBDE 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.
    - b. 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. Proposers may be registered and certified with the Allegheny County Department of Minority, Women and Disadvantaged Business Enterprises. If so, please indicate registration on the MWDBE Participation Statement. Registered Proposers are still required to submit the applicable MWDBE forms.
- c. MWDBE forms and resources can be found at www.alleghenycounty.us/dhs/solicitations:
    - a. MWDBE Forms
        - o MWDBE Participation Statement
        - o MWDBE Waiver Request
        - o MWDBE Contact Information form
    - b. MWDBE Resources
        - o MWDBE Contract Specifications Manual
        - o MWDBE Response Checklist
        - o Guide for completing the MWDBE Participation Statement
        - o Sample Diversity Policy

d. For more information about MWDBEs, including a list of MWDBEs that have been certified by Allegheny County and the Pennsylvania Unified Certification Program, can be found at the [Allegheny County MWDBE website](#).

5.2 HIPAA Compliance

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

5.3 Cyber Security

a. You must meet the minimum computer specifications which begin on page 14 of the [DHS Contract Specifications Manual](#), available at http://www.alleghenycounty.us/Human-Services/Resources/Doing-Business/Solicitations-(RFP/RFQ/RFI).aspx.
b. All electronic devices must have sufficient security software and settings to minimize the risk of an information breach.
c. You 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).

5.4 Equal Employment Opportunity and Non-Discrimination Requirements

By submitting an Application, you agree 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.