

**REQUEST FOR QUALIFICATIONS
(RFQ #1-21)**

FOR

ONLINE SPENDING TRANSPARENCY DATABASE



Issued by:

**City Treasurer's Office
City of Cheyenne, Wyoming**

Proposal Statements due:
**3:00 P.M. (MDT)
FRIDAY, OCTOBER 23, 2020**

at:

**City of Cheyenne
Purchasing, Attn: TJ Barttelbort
2101 O'Neil Avenue, Rm. 309
Cheyenne, WY 82001
(307) 773-1045**

RFQ #1-21

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1. OVERVIEW OF THE REQUIREMENT

- A. Purpose. The City of Cheyenne Treasurer (“Treasurer”) is issuing this Request for Qualifications (RFQ) to obtain a vendor that provides, develops, and maintains an online data product that stores and publicizes fiscal information of the City of Cheyenne. The overall objectives for this project are the following: (1) provide the people of Cheyenne with greater access to robust information on the City’s fiscal activities in a more transparent, user-friendly, and engaging manner, and (2) generate efficiencies and streamline the Treasurer’s internal operations by optimizing data preparation and reporting.

Firms that submit responses (“Respondents”) shall submit their responses to this RFQ by **3:00 p.m. on Friday, October 23, 2020.** This RFQ is a part of a multi-phase procurement process. The Treasurer intends to release a formal Request for Proposal (RFP) at a later date and time and shall notify all Respondents who meet the requirements herein when the RFP is intended to be released.

- B. Intent. This RFQ is intended for Respondents who specialize in software development services, and/or who provide off-the shelf software products that meet the requirements of this RFQ project.
- C. About the Treasurer. The City Treasurer's Department oversees the management and monitoring of all City fund revenues and expenditures and is comprised of eight employees. The primary responsibility of the Department involves maintenance of the City's financial accounting system and financial records in order to accurately report the City's financial position at all times. Additional responsibilities of the City Treasurer's Department include the oversight of the City's annual budget, financial planning and reporting, accounting operations, payroll, and purchasing procedures. The City Treasurer's Department employees work closely with other City Departments and the Governing Body to ensure the expenditure of City funds are compliant with the approved budget, as well as with local, state, and federal laws and Generally Accepted Accounting Principles (GAAP). The City Treasurer's Department consists of two divisions which include Finance and Housing & Community Development.

The Treasurer is committed to fulfilling its duties and objectives in a highly professional and ethical manner by striving for transparency, efficiency, and preservation of the public trust. As such, the Treasurer openly reports and regularly updates a financial and programmatic data on the City’s website, www.cheyennecity.org

In 2008 the Treasurer contracted with Harris Enterprise Resource Planning (Harris ERP) to implement Innoprise software as the City’s financial system which is still currently used today. The City uses several Innoprise applications including Innoprise CCR, Innoprise CIS, Innoprise ComDev, and Innoprise Financials.

- D. Project Overview. The Treasurer seeks a data transparency and accountability product or service that will integrate with specific, supplied data sets from within the Innoprise applications or any future replacement applications. Overall, the Treasurer seeks to optimize the processes by which it gathers, uploads, and presents investment and

financial data online through the fully integrated online spending transparency database. The information to be provided through the online spending transparency database should address the following objectives:

- *Transparency* – Provide citizens with greater access to robust information on the City’s financial activities in a more user-friendly, engaging, and transparent manner;
- *Civic Engagement* – Foster a more informed, engaged public citizenry that actively participates in civic and public policy matters; and
- *Efficiency* – Generate efficiencies for the Treasurer by optimizing data preparation, storage, analysis, and reporting processes.

2. REQUEST FOR QUALIFICATIONS

- A. Addenda. All Any and all respondents may make inquiries in writing to CITY at any time prior to **12:00 PM local time on October 5, 2020**. Any written question of a respondent regarding the meaning or interpretation of the RFQ, work scope, specifications, etc., must be submitted to the CITY prior to the above specified date. The City shall make reasonable efforts to ensure that clarifications given to any prospective respondent shall be similarly furnished to all prospective respondents in summary form as an addendum to this RFQ if the lack of such information could reasonably be considered prejudicial towards uninformed respondents. No technical assistance shall be given by the CITY to any respondent in preparation of its response. Any verbal inquiries by respondents, or verbal responses by the CITY shall not be binding.

Written inquiries shall be directed to:

TJ Barttelbort, Purchasing Manager
City of Cheyenne
2101 O' Neil Ave., Rm. 309
Cheyenne Wyoming 82001
Phone # 307-773-1045
E-mail: tbarttelbort@cheyennecity.org

Any or all changes, additions, or clarifications in connection with this RFQ shall be issued by the CITY in the form of written addenda. Oral comments, responses and/or representations shall not be binding upon the CITY.

If any Addenda are issued, each proposer **must** sign the "Acknowledgment of Receipt of RFQ Addenda" form which will be included with any Addenda, and submit the executed form with its response. The CITY will consider as incomplete any response in which all addenda are not acknowledged and **this will be a basis for response rejection.**

The City intends to respond to all questions and inquiries no later than, **October 9, 2020 at 5:00 p.m.**

- B. Response Submission Format. Respondents shall submit their responses on the date and time specified in this RFQ, sealed in clearly marked envelopes as follows:

Submit one (1) original hard copy, and one (1) electronic copy in PDF format via USB Flash Drive, in a sealed envelope and clearly marked with the following information: (a) the phrase "Request for Qualifications - Online Spending Transparency Database (RFQ #1-21)"; (b) the date and time specified for receipt of responses; and (c) the name and address of the proposer.

The submission included via USB Flash Drive shall be in PDF Format and shall contain **only** One (1) File. (Please merge all documents relating to your proposal into one single PDF document.)

- C. Response Submittal. To be considered, proposal submissions must be received by the City at the following location before **3:00 P.M. local time, on Friday, October 23, 2020** at:

City of Cheyenne, Purchasing Office
2101 O'Neil Avenue, Room 309
Cheyenne, Wyoming 82001
Attn: TJ Barttelbort

Any response received after that time shall not be considered, but shall be returned unopened to the respondent. Telegraphic, fax, or e-mail submittals **shall not** be considered.

- D. Qualifications Review Committee. The qualifications review committee will be comprised of the City's Purchasing Manager, the City's Budget & Accounting Analyst, the Deputy City Treasurer, and the Treasurer.
- E. Review and Selection. The qualifications review committee will check responses against the mandatory criteria. Responses not meeting all mandatory criteria will not be considered for review. Qualified respondents will be provided with a copy of the RFP if one is issued. Please refer to Section 4: Evaluation Criteria found on page 11.
- F. Signed Responses. Signed responses must be provided by company representative(s) who have delegated authority to act on behalf of the company. Electronic copies of original signatures will be accepted, accompanied by the representative's printed name and position title.
- G. Acceptance of Responses. Responses to an RFQ are assessed in light of the qualification review criteria and, if chosen for the shortlist, will be contacted for the RFP.

3. SERVICES

Respondent shall be able to perform the services set forth in this Section in accordance with all applicable federal and state laws, administrative rules, and regulations:

- A. Professional Consulting Services. Contractor will perform the following professional consulting services:
- i. Planning – Meet and collaborate with the Treasurer and, as the Treasurer determines, other staff to plan and devise the optimal integration, deployment, and maintenance strategy for the online spending transparency database product in order to meet the preferences and needs of the Treasurer;
 - ii. Product Integration – Work with the Treasurer and, as the Treasurer determines, other staff to identify and execute the optimal method to manually transfer data from other sources into the online spending transparency database product to support integration; protect the security and integrity of the data; and reduce duplicative work processes in regard to data storage, transfer, reporting, and uploading.
 - iii. Communication Method – Work with the Treasurer and, as the Treasurer determines, other staff to identify and execute the optimal method to publicize and display the Treasurer’s datasets online so interactive data visualizations are customized to meet the preferences and needs of the Treasurer and are available to the public on the Treasurer’s existing website and/or on a central landing page fully managed by the Contractor.
- B. Data Transparency & Accountability Product or Service. Contractor shall provide a product or service that performs the following functions:
- i. Product – Provides a secure product interface with the ability for the Treasurer to manually upload internal data from other sources.
 - 1) The secure interface shall allow select information in internal databases to directly – and if desired, automatically – populate to the Treasurer’s existing website and/or the central landing page in innovative, dynamic, and user-friendly data visualization formats;
 - 2) Interacts seamlessly with the Treasurer’s website, either by way of the pre-existing content management system (“CMS”) or any internally managed system, or by alternative means;
 - 3) Provides upload utility for the Treasurer to make data imports on an on-demand basis;
 - 4) Allows the Treasurer to easily add or modify content or reorganize the layout;

- 5) Allows website users to quickly, easily, and intuitively perform the following tasks with the data presented:
 - a. Click through, expand/collapse, and drill down/up through dynamic charts, tables, and graphs;
 - b. Change the format of chart, tabular, and graphic visualizations (e.g., bar graph, line chart, pie chart, data table, etc.);
 - c. Export data, with the option to export data based on different selectable variables and filters, to common document formats (e.g., Excel, CSV, etc.);
 - d. Share reports and visualizations via email and social media (e.g., Twitter, Facebook, Instagram, etc.);
 - e. Filter, sort, and compare data by category, selectable criteria, or time periods (e.g., month, quarter, and year);
 - f. Allow search functionality by any field type;
 - g. Change the language of the content presented; and
 - h. Provide other useful functions per best practices and innovations in the industry.
- i. Specifications for Data Visualization – As part of the overall online spending transparency database product, enables the Treasurer to publish data and create data visualizations available to users online. For the out-facing content that appears online, data visualizations shall meet the following criteria:
 - 1) Be aesthetically pleasing;
 - 2) All content must be displayed in accordance with current Americans with Disabilities Act (ADA) standards for web content.
 - 3) Be high-resolution;
 - 4) Easy for users to navigate;
 - 5) Consistent with the Treasurer’s current design theme and branding guidelines;
 - 6) Allow full functionality and the best rendering possible, regardless of whether users access the Treasurer’s website via a desktop computer, mobile device, or different operating systems; and
 - 7) Provide for robust analytical interpretation.

- i. Comprehensive Data Solution – Provides the capacity, functionality, and scalability to integrate, store, display, publicize, and readily update the full range of investment, financial, nonfinancial, and programmatic data manually uploaded from data sources of the Treasurer.

The Treasurer shall identify the datasets it seeks to integrate into and display through the online spending transparency database product first, before other datasets are identified for incorporation into the system.

- ii. Dashboard Functionality – Provides detailed dashboard and report-creation functionality, so the Treasurer can quickly and easily run reports and analyses on its data in common file formats (e.g. Word, Excel, PowerPoint, etc.).
- iii. Access – Provides the Treasurer a minimum of eight (8) logins, so multiple employees can access, review, and modify product settings and online spending transparency database content. Product accessibility shall be provided to the Treasurer twenty-four (24) hours per day, seven (7) days per week.
- iv. Test Launch and Public Launch Date – Launches a beta version of the online spending transparency database to troubleshoot and test functionality, and then conducts a full launch of the online spending transparency database product for public consumption by the dates determined in the formal RFP.

C. Support. Contractor shall perform the following support services:

- i. Technical Support – Provide prompt full-service assistance, which includes, but is not limited to, troubleshooting and providing advice to the Treasurer and staff, when they have difficulties or questions about the online spending transparency database product. Contractor shall provide direct, prompt support addressing all issues relating to invalid data or other data errors. Contractor shall provide easy-to-follow instructions on how Treasurer staff should correct the error. For any errors that directly affect the Treasurer’s website and/or the central landing page, Contractor shall fix or assist the Treasurer in fixing such errors within one (1) business day of notification.
- ii. Upgrades – Provide any and all upgrades to the online spending transparency database product.
- iii. Instruction Manual – Provide the Treasurer with a manual that provides clear, step-by-step instructions on using and operating all aspects of the online spending transparency database product.
- iv. Maintenance – Provide maintenance of the online spending transparency database product, as needed.
- v. Tracking Public Utilization – Through the product or service, provide the Treasurer the ability to perform the following:

- 1) Track and monitor public utilization of the data visualizations on the Treasurer’s website (e.g. clicks, exports, variable selection, drill-down usage, etc.); and
 - 2) Generate customizable electronic reports, using public utilization figures over variable timeframes (e.g., July 1, 2021 to June 30, 2022); and
- vi. Availability and Meetings – Be available to discuss any Services described herein with the Treasurer and staff on an as-needed basis. The awarded RFP Respondent shall attend meetings at the request of the Treasurer to present reports and to respond to questions. Such meetings may be conducted via video conference.

D. Reference Project.

- i. The City of Cheyenne is seeking a product that provides relatively the same features and functionality as the State of Wyoming’s WyOpen Transparency Platform. The platform can be found, here: <http://www.wyopen.gov/>
- ii. The City has included this product as a reference to help assist potential proposers in identifying the general requirements of the City.

4. EVALUATION CRITERIA

A. Responses shall each be scored in accordance with respect to the overall responsiveness to the this RFQ. Responses will be scored in accordance with the following Evaluation Criteria:

Criteria	Points Available
i. Overall responsiveness to RFQ	10
ii. Years of experience in the field	10
iii. Experience with the type of project specified in the RFQ	10
iv. Proven capacity to deliver the project requirements on time and on budget	10
v. Sample written reports or other required materials for the position	10
vi. Awards / Certifications	10
Total Points Available	60

5. SUBMISSION REQUIREMENTS

- A. Interested Respondents must submit the following documentation by the submission deadline identified on the cover page of this document to be considered for review:
- i. A completed Company Information Form (Appendix A).
 - ii. A statement of interest.
 - iii. Resume(s) outlining the respondent's experience, the experience of key team members, and a response to the qualification review criteria.
 - a. Provide a statement certifying how long your firm has been providing services of this type.
 - iv. A technical proposal for this project.
 - a. The technical proposal shall demonstrate your firm's ability to meet the needs of this RFQ.
 - b. Provide examples of how data is presented and visualized to end users.
 - c. Provide examples of how raw data is exported and manipulated into the final product.
 - v. An estimated cost proposal for this project.
 - a. An estimated cost proposal shall be submitted for a period of One (1) year (The estimated cost proposal may be submitted in the format of a dollar value range. Example \$20,000.00 to \$25,000.00). If pricing will vary for future years, provide the maximum percentage (%) increase for each additional year. The City will be requesting a not-to-exceed pricing fee proposal during the RFP process. It is the City's intent that further guidance and clarification will be published during the RFP phase of this solicitation, and that will allow selected Proposers to provide their actual costs at that time. An estimated cost proposal is being requested via this RFQ to establish an approximate cost for budgeting purposes.
 - vi. Three (3) professional references.
 - a. Respondents shall provide at a minimum, a list of three (3) reference projects/clients that they currently provide these types of services for, or have provided these types of services for in the last two (2) years.
 - b. The reference projects provided shall demonstrate experience with projects of this type. Please include project costs for each referenced project.

- vii. Provide examples of projects that have been nominated or received awards or certifications for excellence in governmental transparency.

6. GENERAL PROVISIONS

- A. The successful respondent from the RFQ & RFP Process will be subject to the following provisions:

AWARD OF CONTRACT:

Information contained in the response shall be incorporated by reference into and be considered part of the contract between the City of Cheyenne and the selected firm. The City of Cheyenne reserves the right to make modifications to this RFQ / RFP.

The City of Cheyenne retains the right to reject any and all submittals with or without cause. The City also reserves the right to consider and rely upon factors other than pricing in its selection process. In the event, after 30 days, negotiations are unsuccessful with the selected firm, the City of Cheyenne may enter into negotiations with the alternate firms submitting proposals according to rank obtained from the Proposal Evaluation Criteria.

CONTRACT REQUIREMENTS

The successful firm will be required to enter into a Professional Services Agreement, as required by the City during subsequent contract negotiations which may include, but is not limited to, Worker's Compensation Act, Americans with Disabilities Act, Drug Free Workplace, and Indemnification of the City of Cheyenne.

INSURANCE REQUIREMENTS:

The selected Firm must provide proof of the following insurance coverages:

Commercial General Liability Insurance

For claims arising out of bodily injury, illness or death, or from damage to or destruction of property of others, including loss or use thereof, with minimum limits of \$1,000,000 per occurrence, \$2,000,000 aggregate for the entire term of the Agreement.

Workers' Compensation

Workers' compensation coverage shall be in effect for the entire term of the Agreement, as required by Wyoming law, for all employees or agents providing services under this Agreement. Consultant shall provide the City with proof of workers' compensation or employer's liability insurance coverage.

Additional Insurance Information

The Consultant shall name the City of Cheyenne as an Additional Insured by endorsement on its insurance policies, and shall provide the City with a copy of the endorsements. This requirement does not apply to workers' compensation and professional liability insurance policies.

Consultant shall provide the City with certificates of insurance acknowledging the above-stated coverages prior to beginning any work under this Agreement.

It is understood and agreed that these policies are primary and not contributory. All policies required under this Agreement shall be in effect for the duration of the

Agreement. It shall be an affirmative obligation upon Consultant to immediately notify in writing the city risk manager, city clerk, and city attorney of any fact, circumstance, or occurrence that has resulted in or may result in the cancellation of, or substantive change to any insurance coverage required by this Agreement, and failure to do so shall be construed to be a breach of this Agreement.

If requested by the City, the Consultant shall provide the City with copies of insurance policies and/or policy endorsements listing the City of Cheyenne as an additional insured. The City's failure to request or review such policies, endorsements, or certificates shall not affect the City's rights or Consultant's obligation hereunder.

Any insurance company providing coverage under this Agreement shall have a minimum A. M. Best rating of A- (excellent).

7. APPENDIX A - RESPONDENT INFORMATION FORM

Company Name: _____

Company Type: _____

Company Principal's Name and Titles:

Name: _____ Title: _____

Name: _____ Title: _____

Physical Address: _____

City: _____ Zip: _____

Mailing Address: _____

City: _____ Zip: _____

Phone Number: () _____

Fax Number: () _____

Email Address: _____