REQUEST FOR PROPOSALS

RFP No. 26-08

Design Services for Budget and Budget-in-Brief

Date of Issuance: October 21, 2026

As described herein, the City of Delaware is seeking competitive proposals from experienced, forward-thinking and innovative Respondents to transform the City's raw budget data and other related information into engaging and aesthetically appealing City branded documents.

Response Due Date and Time:

November 6, 2026, 2:00 P.M EDT

1. Overview

The City of Delaware is the county seat of Delaware County. Founded in 1808 and incorporated in 1816, Delaware has evolved from its agricultural roots as an early settlement into a thriving suburban community. With a population of approximately 48,600 residents, the City of Delaware ("City") continues to grow, adding new residents, businesses and guests to the community. As this growth continues, so do the City's financial responsibilities. Paramount to this is ensuring the City's financial data is produced, organized, and presented in a way that enhances understanding for the average reader.

Through this Request for Proposal ("RFP") the City is seeking competitive proposals from experienced, forward-thinking, and innovative Respondents to transform the City's raw annual budget data and narratives into an engaging and aesthetically appealing City branded document. In addition, the City is also seeking the development of a budget-in-brief. Upon completion, both the final budget document and budget-in-brief will be included in the City's annual submission for the Government Finance Officers Association ("GFOA") Distinguished Budget Presentation Award.

Proposal responses shall demonstrate the Respondent's capability and prior experience in transforming detailed budget data and narratives into refined, engaging, and distinctive materials promoting public understanding. Prior work samples showcasing effective financial communication, whether developed for governmental entities or other industries, will be a key evaluation component.

For this RFP, "Respondent" and/or "Vendor" is defined as the Vendor and/or Individual who submits a response to this RFP.

2. Scope of Services and Project Deliverables

Established in 1984, the GFOA's Distinguished Budget Presentation Award ("Award") recognizes governmental entities for excellence in budget transparency, accountability, and the quality of budget communications. Awardees must demonstrate their ability to effectively communicate budget information while telling their story to external audiences. The City has received this award since 2021 and seeks to continue this tradition with their next submission.

In 2026, the GFOA established new award criteria in which entities can begin using January 2027. GFOA's purpose in establishing new criteria is to promote greater understanding of budget decisions, to allow entities the ability to innovate, evolve, and be responsive to local expectations, and to promote the use of technology and other tools that may be available.

The selected Respondent shall be responsible for transforming raw budget data and narratives, provided by the City, into an engaging and aesthetically appealing City branded document adhering to both GFOA and City requirements. For this year's award submission only, the City has the option to prepare their response utilizing existing GFOA award criteria or the new GFOA award criteria. As a portion of this work, the selected Respondent shall provide guidance in relation to which award GFOA criteria the City should utilize for their submission.

Regardless of the criteria selected, when preparing the budget document, the selected Respondent shall pay close attention to ensure crucial GFOA criteria are incorporated, including, but not limited to:

- Budget data and narratives formatted and presented in such a way to enhance its understanding for the average reader;
- Incorporation of a clickable table of contents and home (return to ToC) button to provide easy access to all information;
- All pages shall be appropriately numbered, taking care to ensure electronic page numbers are consistent with the table of contents;
- Utilization of colorful graphics, enhanced organizational charts, graphs and financial charts equipped with captions to convey and clarify essential data and information.

Secondly, the selected Respondent shall be responsible for creating a budget-in-brief, not to exceed 20 pages, highlighting the City's unique character. Upon completion, the final product shall present an easy-to-understand snapshot of the City's full budget, distilling the large, technical budget into a concise, accessible format. As this will be the City's first budget-in-brief, no predetermined format or layout exist, although, it is the expectation of the City that the executive summary shall be prepared in such a visually appealing and eye-catching manner, that City Council, residents, and stakeholders alike want to learn about the City's budget, without combing through extensive details. Upon completion, the budget-in-brief shall be available to citizens and stakeholders in the format of a printable booklet, as well as posted to the City's website.

3. Scope of Work

Listed below are the roles, responsibilities and requirements for the selected Respondent.

(1) Provide all personnel, materials, and resources required to successfully complete all aspects of the Scope of Services and Project Deliverables within the project schedule;

(2) Conduct a project kick off meeting with City staff to review project goals, expectations, and finalization of the project schedule;

(3) Throughout the life of the project, coordinate and participate in ongoing meetings with City staff to maintain an open line of communication, clarify uncertainties, and conduct draft reviews;

(4) Review in detail both GFOA award criteria and City requirements, including Section 76 of the City Charter, Budget Message and Ordinance;

(5) Ensure all prepared documents adhere to both GFOA award criteria and City requirements;

(6) Utilize established City branding, including color palettes and graphics, as well as charts equipped with captions, graphs, etc. to convey and clarify essential data and information. The City shall have final approval of all graphics;

(7) Ensure all documentation, both printable and electronic versions, are ADA compliant, including adherence to the newly implemented Web and Mobile Application Accessibility Rules;

(8) Provide the City with the following deliverables in the specified formats:

a. Electronic files of the completed budget to be both shared and stored in an electronic format;
b. Electronic file of the completed budget formatted to be printed, size 8 ½ x 11;
c. Electronic file of Budget-in-Brief formatted to be used as a printable booklet, size 8 ½x 11;
d. Electronic file of Budget-in-Brief formatted to be posted to the City's website;
e. Any guidance materials or design frameworks developed during the project.

4. Project Schedule

Listed below are date estimates to ensure all work is completed and approved by the City in advance of the GFOA Award submission date of March 5, 2027. The City shall be able to provide most of the raw budget data to the selected Respondent on or about December 14, 2026. The remaining budget data (i.e. data requiring 2026 actuals) will be provided on or about January 11, 2027. Following contract execution, the selected Respondent shall collaborate with the City to finalize the project schedule.

City to provide initial budget data to selected Respondent	December 14, 2026
City to provide remaining budget data to selected Respondent	January 11, 2026
Selected Respondent to provide City first draft of Budget Document and Budget-in-Brief for review, edits and feedback	January 25, 2027
City to provide selected Respondent feedback in response to first draft of Budget Document and Budget-in-Brief	February 8, 2027
Selected Respondent to provide City second draft of Budget Document and Budget-in-Brief for review, edits and feedback	February 15, 2027
City to provide selected Respondent feedback in response to second draft of Budget Document and Budget-in-Brief	February 17, 2027
Selected Respondent to provide all final deliverables to the City	February 26, 2027
City to submit completed submission to GFOA	March 5, 2027

5. Minimum Respondent Qualifications

At a minimum, Respondents must meet the qualifications listed below. Failure to meet these minimum qualifications may result in may result in the proposal being found non-responsive and not considered for evaluation.

(1) Five (5) years' experience providing graphic design or publication design services;

(2) Demonstrated experience translating complex financial information into easy-to-understand visuals;

(3) Demonstrated experience in producing public-facing reports, budget documents, infographics, or other government/nonprofit communications.

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6. Instructions to Respondents

6.1 Schedule of Key Milestone Events

Listed below are specific dates and times related to this RFP. Actions with specific dates and times shall be adhered to unless changed by the City via an addendum. All addenda in relation to this RFP shall be posted and available through the City's website at Requests for Proposals and Bid Information | Delaware, OH. It is the sole responsibility of Respondents to ensure receipt of all documentation issued by the City.

RFP Issuance	October 21, 2026
Deadline for submitting Questions	October 28, 2026
Final Addendum to be Issued (If Applicable)	October 30, 2026
Proposal Responses Due	November 6, 2:00 P.M EDT
Virtual Respondent Interviews/Presentations (If Applicable/Estimated)	November 19-20, 2026
Contract Start Date (Estimated)	December 14, 2026

6.2 Questions and Clarifications

Respondents shall submit all questions and/or clarifications in relation to this RFP in writing to Cindy Collins, Procurement Administrator, at procurement@cityofdelawareoh.gov no later than October 28, 2026. Questions or clarifications received after this date will not be answered. Please note verbal inquiries or questions will not be accepted. Responses to all submitted questions will be documented and an addendum will be posted to the City's website at Requests for Proposals and Bid Information | Delaware, OH, as defined in Section 5.1 "Schedule of Key Milestone Events."

6.3 Communication with City Personnel

Respondents shall not meet or initiate communication with City personnel during the RFP process, except as otherwise provided in this RFP or with respect to current or ongoing work. The RFP process is considered to begin on the date the City issues the solicitation and is considered concluded on the date in which an agreement has been fully executed. Any attempts to meet and/or initiate contact with City personnel during the RFP process, other than that expressly authorized by the RFP, may result in the disqualification of said Respondent.

7. Proposal Submission

Proposals in relation to RFP are to be received by the City, via email, no later than November 6, 2026, 2:00 P.M EDT. Responses shall be formatted and sent in a single PDF format, unless otherwise instructed, to Cindy Collins, Procurement Administrator, at procurement@cityofdelawareoh.gov. Proposals received after this date and time shall be considered late, and as a result, not considered for evaluation and award. The City is not responsible for late deliveries and reserves the right to reject any and all proposals. It is the sole responsibility of the Respondent to ensure timely delivery of the proposal as required.

Proposal responses shall be organized per the specified categories listed below and include all information and documentation as requested. Proposal responses shall be completed in chronological order, utilizing the same categories and subcategories as listed below. It is the sole responsibility of the Respondent to ensure their proposal response includes sufficient and required information to allow for the City to complete an evaluation. Failure to submit all information and documentation as requested may result in the proposal being found non-responsive.

7.1 Cover Letter

Respondents shall provide a cover letter detailing their understanding of the purpose, scope, and objectives of the project. In addition, Respondents shall describe how they will utilize their experience, creativity, and implementation of industry best practice to ensure compliance with the defined project goals and scope of services. Lastly, Respondents shall provide the legal name and address of the Respondent, including the name, title, address, telephone number, and email address of the person to whom clarifications and/or communications should be directed.

7.2 Respondent Qualifications and Experience

(1) Respondents shall provide information demonstrating their qualifications and experience in delivering the design and visual presentation services described in this RFP. Specifically, include experience transforming complex financial or data rich content into clear, engaging public-facing documents. Said experience does not need to be with governmental entities.

(2) Respondents shall provide a minimum of three (3) references for projects of similar scope completed in the last five (5) years. For each reference, the following shall be provided:

For each reference, provide:

a) Entity name, location, and scope of services completed;
b) Date range in which services were completed;
c) Reference contact information, including name, email address and phone number.

7.3 Key Personnel

(1) Respondents shall identify and define the roles of the assigned Project Manager and all other key personnel that will be assigned to this project, including detailed information in relation to each person's experience in completing similar services to those as described herein.

(2) A current resume or detailed summary for all key personnel shall be included in the proposal response.

7.4 Project Approach and Proposed Schedule

Respondents shall describe their proposed project approach or strategy to ensure the successful completion of the project goals and scope of services as described herein. In addition, a proposed project schedule outlining how the project will be completed shall be included.

7.5 Work Samples

As a portion of their proposal response, Respondents shall provide digital samples of prior work demonstrating their ability to design, format, and visually present complex financial or operational information in a clear, accessible manner. Samples may include budget documents, financial reports, dashboards, annual reports, or other data heavy public facing publications. Governmental experience is not required. Samples must demonstrate visual quality, layout structure, clarity, consistency, and effective communication of financial or data rich content. As applicable, confidential information may be redacted.

7.6 Cost Proposal

As stated, the successful Respondent shall be responsible for the provision of all personnel, materials, and resources required to successfully complete all aspects of the Scope of Services and Project Deliverables as described in Section 3. Compensation for all services identified herein shall be made in the form of an all-inclusive not to exceed fixed fee, pursuant to milestone payments. As a portion of the proposal response, a fixed fee structure, outlining all components required to successfully complete all services as defined herein shall be submitted. No additional payment will be made for fringe benefits, travel time, travel related expenses, or indirect costs.
In addition, Respondents shall clearly identify all cost components and list any assumptions or exclusions. Lastly, Respondents shall provide hourly rates for any work that may be requested by the City outside the Scope of Services.

8. Evaluation Criteria

All responsive proposals received will be reviewed and evaluated by a team of representatives identified by the City. Non-responsive proposals will not be considered. A non-responsive proposal is defined as a proposal that does not meet or is not compliant with the requirements as specified in the RFP. It is the sole responsibility of the Respondent to ensure all information or documentation is provided as requested.

Responsive proposals will be evaluated as follows:

Evaluation Criteria	Percentage Weight
Respondent Qualifications and Experience	25%
Key Personnel	15%
Project Approach and Proposed Schedule	20%
Quality of Submitted Work Samples	25%
Cost Proposal	15%

9. Proposal Clarification

The City may contact any Respondent in order to clarify uncertainties or eliminate confusion concerning the contents of a submitted proposal. However, Respondents will not be able to modify their proposal as a result of any such clarification request.

10. Respondent Interviews/Presentations

As part of the evaluation process, selected Respondents may be selected to participate in interviews and/or presentations with City staff to further discuss their proposal response. Representative(s) participating shall be qualified to respond to all questions related to the proposal. Notifications for those selected shall be provided in writing by the City. Any costs associated with this process shall be the responsibility of the Respondent.

11. Reference Verification

The City reserves full discretion to determine the competence and capabilities of any Respondent that submits a proposal in response to this RFP. The City may contact any customer of the Respondent, whether included in the Respondent's submitted reference list, and use such information in the evaluation process.

12. Best and Final Offer

The evaluation process may, at the City's discretion, include a request for selected Respondents to prepare a Best and Final Offer ("BAFO"). Participation in the BAFO shall not be construed as award of a contract nor a guarantee that a contract will be awarded.

13. Contract Award

Following the evaluation, including any interviews, presentations or demonstrations, clarifications, reference inquiries and verifications, and best and final offers, the City may proceed in recommending a contract award be made to the Respondent that has been determined to provide the best overall solution to the need as identified herein, at the best value to the City. The City reserves the right to reject any and all proposals.

If the City and the selected Respondent are unable to reach an agreement in a timely manner, the City reserves the right to terminate negotiations with the Respondent. In such circumstances, the City reserves the right to enter into negotiations with an alternate Respondent.

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14. General RFP Terms and Conditions

(1) The City assumes no responsibility for costs incurred by the Respondent prior to the award of any Contract resulting from this RFP.

(2) All proposed offers from Respondents are Vendor and shall remain in effect for 180 days from the proposal due date. Respondents are advised to check their proposal carefully before submitting. Errors cannot be corrected after the proposals are opened.

(3) Except as otherwise provided in this RFP, once accepted, a submitted proposal may not be rescinded, canceled, or modified by the Respondent unless mutually agreed in writing by the parties. The City represents that it will have adequate funds to meet the obligations that will be incurred by the contract awarded. However, the City shall have at its option the right to terminate any resulting contract should its appropriations, spending authority, or other revenues be reduced or, if applicable, if grant funds used to support this project are reduced or terminated.

(4) At the sole discretion of the City, the RFP may be cancelled or reissued, in whole or in part, or a contract may not be awarded, if any of the following apply:

   (a) The goods or services offered are not in compliance with the requirements, specifications, or terms and conditions set forth in this RFP;

   (b) The price(s) offered is considered excessive in comparison with existing market conditions, in comparison with the goods or services to be received, or in relation to available funds;

   (c) It is determined that the award of a contract would not be in the best interest of the City.

(5) Prior to any contract award, Respondent shall be responsible for providing to the City a current Form W-9 to verify Taxpayer Identification Number (TIN).

(6) Respondents shall be subject to and responsible for all applicable federal, state, and local taxes.

(7) The City represents that it is a tax-exempt entity and evidence of this tax-exempt status shall be provided to Respondent upon written request. For any contract awarded pursuant to this RFP, as applicable, Respondent agrees to withhold all municipal income taxes due or payable under the provisions of the Codified Ordinances of the City of Delaware, Ohio, for wages, salaries and commissions paid to its employees and further agrees that any of its subcontractors shall be required to agree to withhold any such municipal income taxes due under such chapter for Services performed under this Agreement.

(8) As applicable, Respondent is advised that all subcontractors shall be bound by all terms and conditions of any awarded contract and shall assume responsibility for all work performed by subcontractors. In addition, subcontractors' costs and expenses will be at the sole expense of Respondent, and Respondent shall be solely responsible for payment to subcontractors and compliance of subcontractors.

(9) Respondent warrants that it is not subject to an unresolved finding for recovery under Ohio Revised Code Section 9.24. If the foregoing warranty is deemed to be false, the contract is void *ab initio*, and the Respondent must immediately repay to the City any funds paid under the awarded contract.

(10) Any contract resulting from this RFP is binding on the successful Respondent. Failure of the Respondent to meet or perform any of the contract terms or conditions shall permit the City to rescind or cancel the contract and purchase replacement articles or services of comparable grade in the open market. The Respondent shall reimburse costs and expenses in excess of the contract price necessitated by such replacement purchases to the City.

(11) Respondent understands all documents contained or incorporated or created pursuant to this RFP are presumed to be public records. If Respondent believes that a document contains trade-secret information, confidential proprietary information, or other data that exempts the document from disclosure and submits the legal basis for that determination, the City will review the matter and may restrict public inspection and copying of the document.