



**Request for Proposal – Issued 09/8/22
Clerk/Customer Service Needs Assessment, Design and Bidding**

Proposal Requested

The Village of Shorewood is seeking proposals for a needs assessment, design, and bidding of our Village Hall first floor clerk/customer service area, including front counter and office space, located at 3930 Murray Avenue.

Project Background

The focus of this study involves identifying current and future workspace needs for the Clerk, Licensing/Elections Clerks (2), Court Clerk, office supply storage, interdepartmental needs, cash receipting, processing/sorting postal mail payments, workspace to print/fold/stuff envelopes, and in-person voting. The Clerk/Customer Service area is located on the first floor of Village Hall and is the main customer contact counter for patrons.

Shorewood Village Hall was built in 1908 as a four-room school to serve Shorewood, then called East Milwaukee. In 1915 this building became the seat of Village government. The building was extensively remodeled in 1937 with Works Progress Administration (WPA) funds, and again in 1985. It was placed on the National Register of Historic Places in 1984.

In 2019, the Court Clerk duties were separated from the Police Department to align with State Statute changes, and the Court Clerk was relocated to workspace area in the Clerk’s office area. While online payments have increased, customers need a place to communicate with the Court Clerk and pay citations in cash and online.

Customer needs for elections changed in 2020. Absentee ballots and in-person voting increased significantly, decreasing the in-person voters on election day. More in-person customer visits occur three weeks leading up to an election and occur in the first-floor lobby across from the customer service counter.

In 2021, the Village modified parking permit regulations and transitioned to online parking permit. This decreased in-person customers. At the same time the Village has observed a need for a payment portal on the first floor that allows customers to pay their citations and parking permits online.

Water & Utility bills are collected at the customer service counter. While payments have increased online, there are still property owners that pay bills in-person. This counter is also the recipient of annual tax bill collection, pet licenses and business licenses.

Following operation changes influenced by COVID the Planning and Development Department receives a significantly higher volume of payments online; however, there still in-person cash payments that are handled through the customer service counter.

Estimated Timeline

RFP issued	September 8, 2022
Tour of Village Hall first floor – 8:30 a.m.	September 16, 2022
Deadline for proposal questions - noon	September 20, 2022
Proposal question responses emailed	September 22, 2022
Proposals due	September 30, 2022
Firms notified of interview	October 14, 2022

Interviews	October 20-21, 2022
Recommendation on vendor	November 7, 2022
Village Board approval of contract	December 5, 2022

The Village will hold a walkthrough of the facility prior to the submission deadline. The tour will take place at Shorewood Village Hall located at 3930 Murray Avenue on September 16, 2022, at 8:30 am. Interested firms are strongly encouraged to attend.

The Village will not be legally obligated to adhere to the dates for interviews, recommendations, and award. Interviews will be with staff and members and the Board chairperson of the recommending Board Committee.

Project Scope

Phase I – Facility Needs Assessment

1. Schedule and convene project kick-off and data compilation meeting.
2. Provide design schedule.
3. Provide monthly design status reports and invoices.
4. Interview key staff on the facility needs, as listed above.
5. Review existing building data include plans, organizational chart, department functions.
6. Assess the current Clerk/Customer Service counter to determine what space is adequate to handle the current and future space demands including but not limited to: customer service area, office space, breakroom, meeting space, office supply storage and copy needs.

Phase II – Design

1. Conduct up to three (3) staff project status meetings related to on-going design activities.
2. Provide a design that includes the current and future needs of the facility for staff review and possible modifications.
3. Prepare probable cost estimate.
4. Present preliminary design concepts for review by internal and external customers.
5. Amend design concepts as necessary based upon feedback and incorporate into final design presented to the Village Board.

Phase III - Bidding

1. Prepare all the necessary construction documents, including but not limited to:
 - a. Develop construction staging plan.
 - b. Adapt Village standard specifications to project as necessary.
 - c. Publish appropriate notices.
 - d. Prepare of a construction cost estimate.
 - e. Provide the final plan set.
 - f. Manage distribution of plan sets and bid documents.
 - g. Attend and conduct bid opening.
 - h. Prepare bid tabulation
 - i. Prepare recommendation of the selected contractor following review and evaluation of bids received.

Proposal Content

The proposal should address the following:

1. Transmittal Information

- a. Firm's name, address, telephone number and lead contact person.
2. References/Experience
 - a. Three client references (name/email/phone) for similar projects in size and scope successfully completed by the proposing firm or individual within the last five years.
 - b. Describe qualifications and experience to perform the work described in the Scope of Work. Experience should include direct experience with the specific subject matter, noting state or local government and County experience if applicable. Include information and examples which demonstrate successful and reliable past performance.
3. Qualifications/Experience of Key Personnel
 - a. Qualifications and experience of key personnel who will be assigned to this project. This includes personnel to perform management of the project and individuals that will have the most contact with the Village during this project and any proposed subcontractors.
 - b. If the project is to be accomplished through an affiliation or joint venture, the names and addresses of those firms must be furnished, including the roles and responsibilities for each. Additionally, for each affiliated firm or joint venture participant, the information regarding experience and qualifications described in (a) above, must be provided.
4. Plan Approach and Timeline
 - a. A descriptive narrative of your proposed approach to successfully perform the project, including a specific description or list of any exceptional, value-added features or capabilities beneficial to the Village the proposal brings to the project.
 - b. Provide a proposed work plan which includes a detailed outline of the time commitment for each phase of the scope of work broken down by tasks, milestones, and duration.
 - c. Provide a sample report of a previous similar project.
5. Cost
 - a. Provide an hourly rate for each project team member and a detailed analysis of the direct hours by task and project phase.
 - b. Please note there will be no reimbursement for travel time, meals, or mileage; these incidental costs should be included in the hourly rates. Only document reproduction costs will be reimbursable.
 - c. Describe the circumstances under which you would propose to modify the fees, and how you would communicate such a potential modification to the Village of Shorewood.
6. Contract
 - a. Please attach a copy of your standard contract for these types of services in the email submitting the proposal.
7. Insurance
 - a. The proposal must include either a description of the firm's insurance or a certificate of insurance outlining the firm's insurance policies which evidence compliance with the requirements noted in the *Terms and Conditions* section of this RFP.

Terms and Conditions

Payment Terms

All invoices for services will be processed within 30 days, pending verification and the receipt of any required documentation of services provided in accordance with the terms of the agreement. If approved service

agreement identifies labor services to be paid hourly, invoice must specify deliverable(s) completed and performed as well as any additional costs for equipment or materials. Invoice will be paid upon completion of each phase unless specified differently in the service agreement. If approved service agreement identifies annual flat fee for services, the Village ask to receive monthly invoices based on equal installments over the contract period.

Insurance

The successful firm shall agree that it will, always during the term of the agreement, keep in force and effect insurance policies required by the contract, issued by a company or companies authorized to do business in the State of Wisconsin and satisfactory to the Village. Such insurance shall be primary. Prior to execution of the written contract, the successful firm shall furnish the Village with a Certificate of Insurance listing the Village as an additional insured and upon request, certified copies of the required insurance policies. The Certificate shall reference the contract and provide for thirty (30) days advance notice of cancellation or nonrenewal during the term of the agreement. Failure to submit an insurance certificate, as required, can make the contract voidable at the Village's discretion. Additionally, the Firm shall not allow any subcontractor to commence work until the aforementioned documents, where applicable, have been obtained from the subcontractor and approved by Village of Shorewood.

Nondiscrimination

In connection with the performance of work under this agreement, the Firm agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, marital status, sexual orientation, sex, disability, national origin or ancestry. This provision must be included in all subcontracts.

Assignment or Subcontract

The contract may not be assigned or subcontracted by the firm without the written consent of the Village. If all or a portion on the contract work is proposed to assigned or subcontracted, the name of the individual(s) to complete the work, address and firm proposed shall be submitted within the scope of the proposal.

Independent Contractor Status

The firm agrees that it is an independent Contractor with respect to the services provided pursuant to this agreement. Nothing in this agreement shall be considered to create the relationship of employer and employee between the parties.

Amendments to Contract

This contract may be modified only by written amendment to the contract, signed by both parties.

Waiver

One or more waivers by any party of any term of the contract will not be construed as a waiver of a subsequent breach of the same or any other term. The consent or approval given by any party with respect to any act by the other party requiring such consent or approval shall not be deemed to waive the need for further consent or approval of any subsequent similar act by such party.

Indemnification and Defense of Suits

The firm agrees to indemnify, hold harmless, and defend the Village, its officers, agents and employees from any and all liability including claims, demands, damages, actions or causes of action, together with any and all losses, costs, or expense, including attorney fees, where such liability is founded upon or grows out of the acts, errors, or omissions of the firm, its employees, agents or subcontractors.

Contract Period

The term of this contract will be 2023 to complete the contracted services.

Termination of Contract

To be defined in the contract document.

Professional Services Contract

If your proposal is accepted and a contract is issued, then this Request for Proposal and all documents attached hereto including any amendments, the firm's technical and price proposals, and any other written offers/clarifications made by the firm and accepted by the Village, will be incorporated into a contract between the Village and the firm, it shall contain all the terms and conditions agreed on by the parties hereto, and no other agreement regarding the subject matter of this proposal shall be determined to exist or bind any of the parties hereto.

The submission of a proposal shall be considered as a representation that the firm has carefully investigated all conditions, has full knowledge of the scope, nature and quality of work required, and is familiar with all applicable State, Federal and Local regulations that affect, or may at some future date affect the performance of this contract.

Acceptance of this proposal will take place only upon award by the Village Board, execution of the contract by the proper Village officials, and delivery of the fully executed contract to the firm. Acceptance may be revoked at any time prior to delivery of the fully executed contract to the successful firm. The contract may be amended only by written agreement between the firm and the Village of Shorewood.

Selection Criteria

Village staff will consider the following in evaluation of the proposals:

1. Past record of performance of the contractor and team on similar projects.
2. Quality and content of the written proposal.
3. Experience and technical competence of the contractor and project team assigned to the project.
4. The contractor's approach to the project, including the Village's confidence in the vendor's ability to satisfactorily perform the work.
5. Cost.

Instructions to Firms

Submittal Instructions

1. Please provide (1) digital copy of the proposal via email only to:
Rebecca Ewald, Village Manager
rewald@shorewoodwi.gov
Deadline: September 30, 2022 – Noon
2. Proposals will be accepted on or before the deadline identified above. Proposals received after that date and time will be rejected. Proposals will not be opened publicly.
3. Questions regarding this RFP should only be directed to staff member identified above. Contact with elected officials, committee members and other staff members is grounds for disqualification.

This RFP does not commit the Village to award a contract, to pay any costs incurred in the preparation of a response to this request or to procure or contract for services or supplies. The Village reserves the right to accept or reject any or all proposals received as a result of this request, to waive minor irregularities in the procedure, to negotiate with any qualified source, or to cancel in part or in its entirety, this RFP, if it is in the best interest of the Village of Shorewood to do so.

Amendments

Amendment of proposals may be done as follows:

By Village: Proposals may be amended by the Village in response to need for further clarification, specifications and/or requirements changes, new opening date, etc. Copies of the amendment will be mailed to prospective vendors.

By Firm: Proposals may only be amended after receipt by the Village by submitting a later dated proposal that specifically states that it is amending an earlier proposal. No proposal may be amended after the opening date unless requested by the Village.

Proposals may be withdrawn only in total, and only by a written request to the Village prior to the time and date scheduled for opening of proposals.

Contract Administration

The staff member is the primary contact for contract administration of this proposal:

Rebecca Ewald, Village Manager
rewald@shorewoodwi.gov
414-847-2701

In the absence of the primary contract, the secondary contract for contraction administration is:

Chris Anderson, Assistant Village Manager
canderson@shorewoodwi.gov
414-847-2705

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