



**Request for Proposal – Issued 8/7/19**  
**Project Facilitator**  
**Village of Shorewood**  
**Shorewood Connects Project**

**Proposal Requested**

The Village of Shorewood is seeking a dynamic, strategic leader to continue the groundbreaking work of the [Shorewood Connects](#) initiative while engaging additional stakeholders in the implementation of Shorewood’s [Age-Friendly Plan 2019-2023](#). This contracted position primarily serves in a community-building role to enhance Shorewood’s age-friendliness with a particular focus on supporting older adult’s ability to remain connected to the community throughout their life span.

The Shorewood Connects Facilitator is responsible for convening work groups of residents and other Village stakeholders to oversee and plan Shorewood Connects activities and to initiate additional activities per the direction of the Elder Services Advisory Board. In addition, the Facilitator will have primary responsibility for ensuring that responsible parties are following through on specific tasks identified in Shorewood’s Age-Friendly Plan, which includes convening additional ad hoc work groups as outlined in the plan.

The desired service agreement is for a 3-year term (2019-2022) with an option for annual renewal for two years. The contract is for 10-16 hours per month.

**Project Background**

A Robert Wood Johnson grant opportunity funded a study to assess Shorewood older adult needs in 2007. The study served as a springboard for the development of what would become Shorewood Connects, a community-building project to promote age friendliness. At the request of the Elder Services Advisory Board (ESAB), the Village Board agreed to form a contract in 2008 with Sue Kelley, a Shorewood resident and facilitator of a grant-funded Milwaukee County program called Connecting Caring Communities, a model for the development of Shorewood Connects, to facilitate the Shorewood effort.

The community-building work performed by the combined forces of the Senior Resource Center and Shorewood Connects, resident volunteers, the Shorewood School district (representatives sit on both the Intergenerational and Dementia awareness Committees), and Village staff has resulted in national recognitions. In 2014 [Generations United](#) recognized Shorewood as one of the four best intergenerational communities in the nation. In 2017 [AARP](#) recognized Shorewood as the first Age Friendly Community in Wisconsin.

Shorewood Connects continues its contractual relationship with the Village to maintain ongoing initiatives and to implement the recently approved Age-Friendly Plan.

**Estimated Timeline**

Request for Proposals released	August 7, 2019
Deadline for proposal questions to be submitted in writing	August 12, 2019
Proposal question responses emailed	August 14, 2019
Proposals due	September 4, 2019
Consultants notified of interview	September 10, 2019

Interviews  
Elder Services Board review  
Village Board consideration of contract

September 16 - 19, 2019  
October 3, 2019  
October 7, 2019

The above schedule for review by the Village is subject to change. 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**

#### Current Shorewood Connects initiatives:

Convene, facilitate and maintain communications within work groups. Work groups consist of village and school district staff, residents and local businesses and organizations.

- 1) The Dementia Awareness and Education Work Group seeks to reduce stigma associated with Alzheimer's disease and other forms of dementia and link caregivers and persons with dementia with resources and support. Activities overseen by the Work Group include:
  - Coffee and Conversations monthly discussion is a support group for caregivers facilitated on a voluntary basis by former caregivers and a geriatric care manager who are work group members. Shorewood Connects Facilitator sends a monthly reminder email/phone call to caregivers, secures alternative meeting space if needed. Assures coffee and supplies are stocked and Facilitators are available for the monthly meeting.
  - Community education programs are developed by the work group in response to perceived and expressed community needs. The Shorewood Connects Facilitator is responsible for overall program implementation and evaluation, convening the work group, facilitating the planning discussion and following up on communication and work group member assignments.
  - The Shorewood Memory Café meets on the third Thursday of the month at Three Lions Pub, 2:30 – 4 pm. The Shorewood Connects Facilitator serves as an alternate to the Memory Café Facilitator, also contracted through the Shorewood Senior Resource Center, to assure that a program is in place and volunteer roles are assigned. Occasional attendance and volunteer support is expected.
- 2) Intergenerational work group is primarily responsible for the fall and spring yard clean-ups. The Shorewood Senior Resource Center contracts with an individual to coordinate the responsibilities related to the yard cleanup. The Shorewood Connects Facilitator is a work group member and serves in a support role on this committee; the Yard Clean-up Facilitator is responsible for recruitment of a new yard cleanup Facilitator should one be needed.
- 3) The Neighbor of the Year/Neighborhood of the Year is an annual competition to promote neighborliness. Neighborhoods are encouraged to apply by filling out a simple application that defines their boundaries and discusses neighbor interactions. Neighbors are also asked to nominate

someone to be recognized for their individual support of neighbors. The Shorewood Connects Facilitator updates the application and announcement, promotes the spring competition, solicits applications, convenes a review panel to determine winners, communicates with applicants, and orders award/sign/banner, coordinates with 4<sup>th</sup> of July event planners and Shorewood Today magazine.

#### New Shorewood Connects Initiatives included in Shorewood's Age-Friendly Plan 2019-2023:

- Working with ESAB and the Pedestrian & Bike Safety Committee, plan a winter walk audit and a possible summer walk audit, using AARP's Walk Audit guide; prepare report and follow-up as needed.
- Convene an ad hoc work group on snow/ice removal initiatives; prepare recommendations and follow-up as needed.
- Working with lead ESAB members, monitor the development of the neighborhood connections initiative as outlined in the plan; provide support as needed.
- Working with ESAB and the Village Marketing Committee, ensure the creation of a Village-wide Age-Friendly Pledge Campaign modeled after Dementia Friends (2023).
- Working with the Intergenerational Work Group, explore strategies to increase volunteer opportunities for older adults within the School District.
- Recruit and supervise a UWM student intern for senior home share research project.
- Convene a Housing Options Work Group to identify and recommend promising affordable housing strategies for older adults in Shorewood; prepare a report and follow-up as needed; share information with Village residents.
- Serve as the liaison with AARP's Age-Friendly Communities Network; submit reports as required.

#### Other related duties:

- Maintain the Shorewood Connects Facebook Page
- Work closely with the Shorewood Connects Village staff liaison to ensure coordination of activities
- Ensure that all Shorewood Connects activities and events are marketed and promoted
- Prepare reports at the request of ESAB and/or the Village Staff liaison
- Represent Shorewood Connects at meetings, workshops, conferences and Village events as required:
  - Elder Services Advisory Board Monthly Meetings (first Thursday of the month at 4 p.m.)
  - Village Board as needed
  - Other Village Committees depending on initiative include: Ped & Bike Safety, Community Development Authority, Human Relations, Marketing Committee
  - Public hearings and meetings in Milwaukee County related to older adults as needed
  - AARP-sponsored Age-Friendly meetings and events when scheduled
  - Quarterly AARP Age-Friendly meetings with other communities

#### **Proposal Content**

The proposal should not exceed ten (10) single-sided pages and should address the following:

1. Name, address, telephone number, email and contact person for the proposal submitted. A statement of your individual and/or firm's specific abilities to provide the required professional services and qualifications related to the Village's needs.
2. Brief history of individual or firm.
3. Key personnel proposed as project team members, including resumes.

4. References of other municipalities or entities for which the firm/individual has provided similar professional services. Reference information must include:
  - a. Name
  - b. Contact Person
  - c. Telephone number and email
  - d. Firm's key personnel assigned to the project.
  
5. Personnel Experience. Please submit a BRIEF description of the following:
  - a. Name
  - b. Proposed responsibilities
  - c. Professional registrations, certifications
  - d. Description of related past experience, particularly experience of a similar capacity on projects of comparable size and/or scope and experience related to working with older adults.
  - e. Provide at minimum three references for the experience noted in proposal
  
6. Cost.
  - a. The Village is proposing to lock in a "do not exceed" annual cost for a three-year period. Annual pricing must be lump sum and all-inclusive.
  - b. Please note there will be no reimbursement for travel time, meals, or mileage; these incidental costs should be included in the all-inclusive, lump sum. Only document reproduction costs will be reimbursable.
  
7. Contract.
  - a. If applicable, please attach a copy of your standard contract for these types of services in the email submitting the proposal.

## **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.

Monthly invoices should be based on equal installments over the contract period.

### *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:           October 8, 2019 – November 30, 2022.

### *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 consultant on similar projects.
2. Quality and content of the written proposal.
3. Experience of the consultant.
4. Familiarity of the consultant with the types of issues typically encountered on projects such as this and the recommended alternatives to address such issues.
5. General understanding of, and agreement with the consultant's approach to the project, including the Village's confidence in the consultant's ability to satisfactorily perform the work.

6. Cost.

**Instructions to Firms**

*Submittal Instructions*

1. Please provide (1) digital copy of the proposal via email only to:  
Elizabeth Price, Senior Resource Center Coordinator  
eprice@villageofshorewood.org  
Identify proposal name into subject line of the email: Shorewood Connects Facilitator  
Deadline: TIME 4:00 p.m. CST  
September 4, 2019
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 primary contact for contract administration of this proposal:

Elizabeth Price, Senior Resource Center Coordinator  
eprice@villageofshorewood.org  
414-847-2727

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

Tyler Burkart, Assistant to the Village Manager  
tburkart@villageofshorewood.org  
414-847-2705

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