



**Request for Proposal – Issued 2/18/20**

**UPDATED 3/18/20 with Q&A**

**VILLAGE OF SHOREWOOD – COMPREHENSIVE PLAN UPDATE**

**Proposal Requested**

The Village of Shorewood is seeking a consultant to both lead and assist with the development of updates to its Comprehensive Plan. The consultant will work with the Planning & Development Director to facilitate public engagement, and confirm or re-confirm goals, objectives and recommendations within the required plan elements. This endeavor has been described as an update, rather than a rewrite, and incorporation of recent planning efforts pertaining to transportation, housing and economic development is expected. Primary efforts will be spent on Issues and Opportunities, Land use and Intergovernmental Cooperation. See the Project Scope included within this RFP for complete details.

**Project Background**

The village of Shorewood, Wisconsin (population 13,315 – 1.6 sq. miles) is located within Milwaukee County's North Shore communities. It is a completely built-out, first-ring, urban suburb of the city of Milwaukee that is amongst the most densely developed municipalities in the state of Wisconsin. There are approximately 28 miles of roadway within the village serving 6,453 housing units, 53.4% of which are renter occupied. The village is an engaged, walkable community served by public transit. It is located adjacent to the University of Wisconsin-Milwaukee, and within a short commute to employment within Downtown Milwaukee. The Village also maintains two commercial corridors (N. Oakland Ave. and E. Capitol Dr.) that have significant multi-story office, residential and mixed-use properties.

The Village's last Comprehensive Plan was adopted in January 2011. Per State Statute 66.1001, municipalities must update their Comprehensive Plan every 10 years. In recognition of that requirement, the Village of Shorewood is looking to update its Comprehensive Plan in 2020 with anticipated adoption prior to 2021.

The purpose of the Comprehensive Plan is to identify issues, opportunities, needs and organize public policy to address them in a manner that makes the best and most appropriate use of Village resources. It will also describe a desired future for the community over the next 20 years and establish goals to move toward that future. The Comprehensive Plan will be used by both elected officials and village staff to assist and provide a rational basis for local land use decisions within the community.

The project will be led by the Planning & Development Director under the oversight of the Plan Commission. Ultimate approval will be required through the Village Board. Additional engagement with other Village committees and staff will be expected throughout the process. Communication with and to those groups will be coordinated through the project leader (Planning and Development Director).

### **Estimated Timeline**

The Village anticipates that this update can be undertaken in the summer and fall of 2020 with approval prior to the end of the year. Details of the RFP timeline are noted below.

RFP published	February 18, 2020
Deadline for proposal questions and notice of interest	March 11, 2020
Proposal question responses emailed to consultants of interest	March 18, 2020
Proposals due	March 27, 2020
Firms notified of interview (if needed)	April 3, 2020
Interviews (if needed)	April 13-17, 2020
Plan Commission recommendation	April 28, 2020
Village Board approval of contract	May 4, 2020

The above schedule for review by the Village is subject to change. The Village anticipates the need to conduct interviews within this RFP process. The Village will not be legally obligated to adhere to the dates for interviews, recommendations and award. Interviews will be with staff and representative(s) of the recommending committee (Plan Commission).

### **Project Scope**

#### ***Task 1 Public Participation***

- A. Develop and obtain approval from the Village Board of a Public Participation Plan in compliance with Wis. State Stat 66.1001(4)(a)
- B. Organize, advertise, plan and present community engagement efforts and public hearings as approved in the public participation plan. These efforts shall include:
  1. An overview of the Comprehensive Plan Update process
  2. Opportunities for citizen, elected and appointed/volunteer officials, businesses, community stakeholder and staff input and review
  3. Draft and final presentations

#### ***Task 2 Review Existing Conditions and Previous Planning Efforts***

- A. Familiarize yourself with the Village through elected official, stakeholder, citizen and staff engagement
- B. Review previous planning efforts, to include, but not be limited to, the following:
  1. Village of Shorewood Comprehensive Plan 2030
  2. Vision 2025
  3. Housing Market Study and Needs Analysis, 2020
  4. Transportation and Parking Analysis, 2020
  5. Age-Friendly Plan, 2019
  6. 2019-2028 Long Range Financial Plan
  7. 2019 Community Survey Results
  8. Human Relations Commission – Village Board Defined Framework and Orientation
  9. Central District Master Plan, 2015
  10. Comprehensive Park Plan, 2015
  11. Ped/Bike Plan, 2015

#### ***Task 3 Develop Required Plan Elements***

- A. Issues and Opportunities (Lead)
  1. Take lead on the facilitation and development of required plan elements
  2. Develop required maps or exhibits, as necessary.
  3. Confirm goals, objectives and recommendations through public engagement

- B. Housing (Assist)
  - 1. Work with staff to update and revise as necessary through the incorporation of recent planning efforts
  - 2. Develop required maps or exhibits, as necessary.
  - 3. Confirm goals, objectives and recommendations through public engagement
- C. Transportation (Assist)
  - 1. Work with staff to update and revise as necessary through the incorporation of recent planning efforts
  - 2. Develop required maps or exhibits, as necessary.
  - 3. Confirm goals, objectives and recommendations through public engagement
- D. Utilities and Community Facilities (Assist)
  - 1. Work with staff to update and revise as necessary through the incorporation of existing planning efforts
  - 2. Develop required maps or exhibits, as necessary.
  - 3. Confirm goals, objectives and recommendations through public engagement
- E. Natural and Cultural Resources and Sustainability (Assist)
  - 1. Work with staff to update and revise as necessary through the incorporation of existing planning efforts
  - 2. Develop required maps or exhibits, as necessary.
  - 3. Confirm goals, objectives and recommendations through public engagement
- F. Economic Development (Assist)
  - 1. Work with staff to update and revise as necessary through the incorporation of recent planning efforts
  - 2. Develop required maps or exhibits, as necessary.
  - 3. Confirm goals, objectives and recommendations through public engagement
- G. Intergovernmental Cooperation (Lead)
  - 1. Work with staff to update and revise as necessary
  - 2. Develop required maps or exhibits, as necessary.
  - 3. Confirm goals, objectives and recommendations through public engagement
- H. Land Use (Lead)
  - 1. Take lead on the facilitation and development of required plan elements with particular attention to:
    - a. Land Use trends and projections
    - b. 2040 Future Land Use Map
    - c. Zoning Map and Code recommendations
  - 2. Develop required maps or exhibits, as necessary.
  - 3. Confirm goals, objectives and recommendations through public engagement
- I. Implementation (Assist)
  - 1. Work with staff to confirm and compile
  - 2. Develop implementation table with actions, responsible parties, priorities and budget considerations

**Task 4 Compile, Present and Deliver Village of Shorewood Comprehensive Plan 2040**

- A. Compile Comprehensive Plan Update in accordance with 66.1001
- B. Deliver concise, user-friendly final document incorporating graphics, narrative, goals, objectives, recommendations, maps and exhibits in formats transferable to Village staff and software.
- C. Present draft and final plan elements to Plan Commission for recommendations
- D. Present final plan to Village Board for adoption, via public hearing
- E. One digital and 15 color-printed copies of the final plan document

## **Proposal Content**

The proposal should not exceed 10 single-sided pages, not including appendices, and should address the following:

1. Transmittal Information.
  - a. Firm's name, address, telephone number and contact person(s).
  - b. Firm's confirmation of understanding of the project and commitment to provide the appropriate personnel, equipment and facilities to perform the scope of services as defined in this document.
  
2. Approach.
  - a. Provide a description of the anticipated planning efforts in relation to Project Scope.
  - b. Identify your expected Public Participation Plan, including number and purpose of meetings or other efforts
  - c. Outline your proposed staffing levels and activities.
  - d. Provide estimated hours for all tasks.
  
3. Personnel Experience. For each project team member please submit a BRIEF description of the following:
  - a. Name
  - b. Proposed responsibilities
  - c. Professional registrations
  - d. Description of related past experience, particularly experience of a similar capacity on projects of comparable size and/or scope
  - e. Profiles or resumes may be included within appendices.
  
4. Previous work samples and references.
  - a. Provide examples of previous, related work. Full documents may be attached as hyperlinks or appendices, as necessary.
  - b. Provide a list of references of comparable clients.
  
5. Cost.
  - a. Provide a cost "not to exceed" per task (and each Plan Element sub-task within Task 3) along with an hourly rate for each project team member working on those tasks and a detailed analysis of the expected hours by task and position to satisfactorily perform the scope of services.
    - i. Costs shall be commensurate to the proposed work. The Village does not anticipate costs to exceed \$30,000.
  - b. Please note there will be no reimbursement for travel time, meals, or mileage; these incidental costs should be included in the hourly rates.
  - c. Describe the circumstances under which you would propose to modify the fees, including the rate at which the Village would be charged for additional work, 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 based upon completion of defined deliverables to be confirmed within the contract, pending verification and the receipt of any required documentation of services provided in accordance with the terms of the agreement. Payment will be issued based on monthly invoices for payment based on an hourly rate and identification of percentage of tasks completed.

### ***Insurance***

The successful firm shall agree that it will, at all times 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 specified in the contract based on the expected timeline to complete the required analysis and plan document.

***Termination of Contract***

To be defined in the contract.

***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. Quality and content of the written proposal.
2. Experience and technical competence of the consultant and project team assigned to the project, including previous work samples and references.
3. Familiarity of the consultant with the types of issues typically encountered on projects such as this and the recommended alternatives to address such issues.
4. General understanding of and agreement with the consultant’s approach to the project, including public engagement and the Village’s confidence in the consultant’s ability to satisfactorily perform the work.
5. Ability to complete the project within the necessary time frame.
6. Cost.

## **Instructions to Firms**

### ***Submittal Instructions***

1. Please provide one (1) digital copy of the proposal to:  
Bart Griepentrog, AICP, Planning & Development Director  
[bgriepentrog@villageofshorewood.org](mailto:bgriepentrog@villageofshorewood.org)  
Identify proposal name into subject line of the email:  
Comprehensive Plan Update  
Deadline:  
4:30 PM CST  
Friday, March 27, 2020
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. Depending on cost, the Village may opt to remove portions of the scope, prior to the contract period. 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 proposal due 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:

Bart Griepentrog, AICP, Planning & Development Director  
[bgriepentrog@villageofshorewood.org](mailto:bgriepentrog@villageofshorewood.org)  
(414) 847-2647

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

Rebecca Ewald, Village Manager  
[rewald@villageofshorewood.org](mailto:rewald@villageofshorewood.org)  
(414) 847-2701

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## **Responses to submitted questions:**

### Mapping -

- What mapping software does the Village of Shorewood currently use?  
The Village contracts with MSA Professional Services for mapping. They utilize ArcGIS through esri.

Will the consultant team have access to existing Village maps, associated data, and electronic files?

Yes, access to all Village maps and data will be provided upon request.

- What are the Village's goals/expectations for the comprehensive plan update with regard to online presence, i.e. interactive mapping, readability across multiple devices and formats, etc.?  
Public participation efforts, including any online or interactive materials will be based upon the Public Participation Plan to be compiled by the consultant and approved by the Village Board as noted in Task 1.

### Multi-media products -

- As noted on the Village's website, social media is used to notify the public of events/news. Is the Village anticipating utilizing social media as part of the comprehensive plan update public participation process? Who will be responsible for posting and maintaining social media communications?

Public participation efforts, including any online or interactive materials will be based upon the Public Participation Plan to be compiled by the consultant and approved by the Village Board as noted in Task 1.

That being said, it is anticipated that social media will be part of that Plan. Any social media efforts specifically related to the Comprehensive Plan Update would be anticipated to be generated by the consultant with either publication or shares administered by the Village.

- Will the comprehensive plan update have a dedicated webpage? Who will be responsible for posting and maintaining?  
Yes, a dedicated webpage will be created for this effort with administration the responsibility of the Planning & Development Director; however, specific content for that page may be requested of the consultant for inclusion.

### Coordination with Village staff –

- As noted in the RFP Project Scope, there are some plan elements in which the consultant team would assist rather than lead. Please clarify expectations for assisting with the update to those elements.  
Content for elements identified for assistance will be drafted by Village Staff; however, public participation and collaboration of those elements within the context of the full plan, as well as final formatting will be expected of the consultant. A collaborative team approach is anticipated throughout the project.

- As noted in the RFP, the Project Scope includes public meeting organization, advertisement and presentations. Is the consultant team responsible for securing meeting space and distributing public notices/invitations for events?

The consultant will be responsible for identifying public meeting space needs. If those needs can be accommodated within Village controlled space, coordination of those reservations will be made by staff. However, if desired space is unavailable or off-site suggestions are preferred, the consultant will be required to collaborate with staff to identify appropriate alternatives. Public notices meeting governmental requirements will be posted by staff. Additional notice would be a collaborative effort.

1. Can you expand on the consultant's role in the plan elements that are lead by the Village and the consultant assists?

Content for elements identified for assistance will be drafted by Village Staff; however, public participation and collaboration of those elements within the context of the full plan, as well as final formatting will be expected of the consultant. A collaborative team approach is anticipated throughout the project.

2. What is the Village's expectation regarding maps and graphics in the Comprehensive Plan?
  - a. What is the Village's capacity in updating the maps? Does the Village have GIS base files and data to update maps?

The Village contracts with MSA Professional Services for mapping. They utilize ArcGIS through esri. Maps required as elements of the plan may be coordinated from the consultant through Village staff to our vendor. Additional maps would be the responsibility of the consultant. Any base map information available from the Village will be shared.

- b. Is the consultant expected to lead the update of all plan element maps? Or provide input on the Village's updates?

Yes, the consultant would be expected to take the lead on identifying and ensuring that all required map elements are drafted; however, that work may be coordinated through Village staff to our existing vendor, if desired.

In other words, if the consultant tells us what they need, we can coordinate through our vendor. However, if it is easier for the consultant to create the maps themselves with our base data, there would be no objection, as long as the final product is provided to the Village.

Please prepare proposals according to your preference.

3. Given the consultant's assisting role on some plan elements and lead role, what are expectations for project management and check ins between Village staff and the consultant? How does this impact the project timeline – will the Village and consultants work on their plan elements concurrently?

A collaborative team approach is anticipated throughout the project. Project timelines will be established as one of the first activities. It would be expected that some elements may be drafted concurrently. Check-ins would be anticipated on a weekly or bi-weekly basis.

4. On page 3 of the RFP and the discussion of the Implementation Element, what are the budget considerations that will be included? Would these be cost estimates?

Correct, these budget considerations relate to recommended actions. If for example the plan recommends to consider the installation of certain infrastructure, estimated costs associated with that infrastructure should be provided within the Implementation element.

5. Is there anything missing from your last plan that you would like to see in the Plan Update? Are there major issues you want addressed with this plan?

The Plan Update should be prepared in compliance with State requirements. Any "major issues" would be expected to arise within the Issues and Opportunities element of the plan. Unless related to another required element, it would not be expected that those issues be addressed within the scope of this project. The "Lead" elements were identified as primary points of emphasis.