

**Strategic Planning**

**Request for Proposal**

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**Section 1 - RFP Overview**

* 1. **Introduction**

La Crosse County, organized in 1851, is in southwest Wisconsin, along the Mississippi River on the west, and beautiful bluffs and farmland to the east. The County occupies a land area of 481 square miles and serves a population of 120,447 (2020 estimate).

The County’s legislative body is the 30-member Board of Supervisors, each elected to a two-year term of office. The Board delegates responsibility to its membership by using the Standing Committee form of government. The six committees are Executive; Veteran’s, Aging and Long-Term Care; Health and Human Services; Judiciary and Law; Planning, Resources and Development; and Public Works and Infrastructure. The Board appoints an Administrator to carry out its policies and ordinances. The Administrator is also responsible for preparing the annual budget, appointing department heads, and overseeing the day-to-day operations of the County.

La Crosse County had 990 full-time equivalents as of August of 2023.

**1.2 Project Description:**

A decision was made by the County Board to create a strategic plan to set priorities, allocate resources and ensure that staff and Board are working towards a common vision. The County Board has agreed to use a skilled facilitator to guide this process. The purpose of this Request for Proposal (RFP) is to establish a contract from a qualified facilitator to assist in the development of a Strategic Plan for the La Crosse County Board of Supervisors and key leadership staff. The budget for this project is potentially up to $50,000.

**Section 2 - Proposal Submittal Instructions**

**2.1 RFP Schedule**

The following is a list of the important dates for activities related to the RFP process. La Crosse County reserves the right to change these dates and will post the changes on its web site.

|  |  |  |
| --- | --- | --- |
| Activity | Time | Date |
| RFP released |  | 10/4/23 |
| Vendor Conference  |  | 10/18/23 |
| Submission of proposals |  | 11/8/23 |
| Vendor Interviews |  | 11/29/23 |
| Executive Committee Meeting  |  | 12/13/23 |
| County Board Meeting |  | 12/21/23 |

**A pre-proposal vendor conference is scheduled for a start time of 9 am, October 18, 2023, in the following location:**

**Conference Room 1107
County Administrative Building
212 6th Street North
La Crosse, WI**

The Administrative Center is located at 212 6th Street North in La Crosse. Public parking is in the center two (2) rows of the parking lot next to the Administrative Center. The parking lot access is on 7th Street.

Vendors may also attend virtually. Persons wanting to attend virtually should contact Bryan Jostad no later than 1 pm, October 17, 2023, for arrangements.

**La Crosse County will present expectations and will conduct a question / answer session.**

Questions regarding the RFP will be addressed at the vendor conference. The County may provide oral clarifications, explanations, or responses to inquiries; the County is not bound by any oral representation. If any new and/or substantive information is provided in response to questions raised at the vendor conference, it will be recorded in a written addendum to this RFP.

###  2.4 Submission of Questions

 Bryan Jostad, Purchasing Manager
 608-785-5879, bjostad@lacrossecounty.org

##  2.5 Submission of Proposals

All proposals shall be submitted in complete original form using the [DemandStar Network](http://network.demandstar.com/for-government/) as the procurement information notification and document distribution system. ***DemandStar*** will also serve as the proposal collection destination. La Crosse County will no longer accept proposals that are mailed, (UPS, Fed EX, U.S.P.S.) faxed or dropped off in person.

Vendors may register on-line on the general [DemandStar website](http://network.demandstar.com/for-government/) or ([https://www.demandstar.com](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.demandstar.com%2Fapp%2Flogin&data=04%7C01%7Ctjclark%40lacrossecounty.org%7Cb0e6012b60b34a6001f208d94d2bc24f%7C90642ce53c114728aa2dfc5917738a93%7C0%7C0%7C637625672607349105%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=i5UZa173wv5xyCnmhXcMVhBIYsZXhJqVOiY%2BZVeS1I0%3D&reserved=0)) to ensure free automatic notification of and access to RFP’s, RFQ’s, and bids. If your business currently subscribes to DemandStar Services, and its service territory includes the entire State of Wisconsin or a larger area, the service connecting your business to this RFP may already be included within your subscription.

**Proposals submitted will be marked as “Strategic Planning RFP” and must be submitted to *DemandStar* no later than 10 am (CST), November 8, 2023.**

**Proposals received after the above date and time will not be reviewed.**

## 2.5 Opening of Proposals

The proposals will be publicly opened at 10:05 am, November 8, 2023, in the following location:

**County Administrative Center**

**Conference Room 2100**
**212 North 6th Street**
**La Crosse, WI**

At that time, the names of vendors who properly submitted proposals will be announced. Announcement of the names of the vendors who submitted proposals is not a guarantee that the proposals otherwise comply with the specifications of this RFP.

Vendors may attend the Opening of Proposals virtually. Please contact Bryan Jostad at least 24 hours in advance.

### 2.7 Ownership of Proposals

All proposals submitted on time become the property of La Crosse County upon submission, and the proposals will not be returned to the Vendors. By submitting a proposal, the Responder agrees that La Crosse County may copy the proposal for purposes of facilitating the evaluation.

**2.8 Other information**

Vendors may submit any other information that is not described in this proposal that would be beneficial to La Crosse County. If in the vendor’s opinion the County has overlooked anything material or relevant, such item(s) may be brought to the County’s attention and be included in the proposal.

**2.9 Public Records Law**

All proposals are subject to the Wisconsin Public Records Law.

**Section 3 Qualifications

3.1 Organization Information**

1. Letter of introduction that includes name of contact person and contact information (email address, phone number, etc.), no more than two (2) pages.
2. Office location(s)
3. Organization’s mission in relation to this project

**3.2** **Relevant Experience**

 Organizations shall provide information regarding experience with similar projects &
 organizations.

1. Strategic Planning with County Government
2. Strategic Planning with City Government
3. Strategic Planning with Villages and Townships
4. Strategic Planning with private industry organizations
5. Other Strategic Planning experience, including an
6. Example of completed Strategic Plan from prior engagement.

 **3.3 Organization and Key Personnel**

 A. Responsibilities and relevant qualifications of key personnel providing services
 for this project.

**Section 4 Scope of Work**

**4.1 Overview**Facilitate a strategic planning process with the County Board and key leadership staff that:

* Ensures all voices are heard in an equitable way.
* Encourages and supports innovative thinking and visionary policy making.
* Develop a strategic plan that guides our key decisions over the next 3-5 years.
* Provides integration of the plan with existing county initiatives.
* .

**4.2 Objectives**Facilitate strategic planning sessions to include:

* Creation of Vision Statement
* Creation of Mission Statement
* Define Organizational Values
* Utilize Vision Statement, Mission Statement, and values to create a strategic plan.
* Strategic Plan should cover 3-5 years and include goals, strategies, and desired outcomes. Outcomes should be measurable and directly linked to stated goals.
* Strategic Plan should be directed at the County Board level as it will primarily guide the Board and Administration in setting budget priorities and operational polices that are in alignment with the overall strategic plan.

**4.3 Project Approach**

Provides a detailed and robust overview of how to approach the full scope of work referenced in the RFP including:

* The vendor is to prepare a work plan and schedule to meet the established objectives.
* The vendor is to prepare a communication plan regarding coordination of meeting and project progress.
* The vendor will work with County staff and County Board representatives to develop an engagement plan for gathering data and stakeholder information. Aspects of the plan shall include in-person and virtual meetings, survey instruments (if applicable), focus groups (if applicable).
* At the conclusion of the project, the final strategy document shall be presented at a County Board meeting.

**4.4 Project Timeline**

The timeline goal shall be to present the Final Strategy Plan document to the County Board at the June 10, 2024 County Board Planning Meeting.

**Section 5 Cost of Project – Financial**

**5.1** Vendors shall provide a fixed fee for providing services.

**5.2** Vendors shall propose an invoicing schedule. The invoicing schedule shall be
 mutually agreed upon by La Crosse County and the selected Consultant.

**Section 6 How to respond to this RFP.**

**6.1** Provide the requested information in Section 3 Qualifications.

**6.2** Provide a Project narrative incorporating the Project Description
 (Section 1.2), Scope of Work (Sections 4.1 to 4.3).

**6.3** Provide timeline that integrates the program narrative and presentation of the Final
 Strategy Document (Section 4.4).

**6.4** Provide Financial information in Section 5

**Section 7 Evaluation of Proposals**

### 7.1 Evaluation Criteria

La Crosse County will evaluate the proposals using the criteria described below.

|  |  |
| --- | --- |
| Category | Points |
| Qualifications | 100 |
| Scope of Work | 100 |
| Cost of Project | 100 |
| Initial Evaluation Total | 300 |
| Interview | 300 |
| Grand Total | 600 |

**7.2 Initial Evaluation**

Each proposal shall receive an initial evaluation. The proposals will be reviewed by an evaluation team. The highest evaluated vendors; up to 3; shall be requested to meet with the evaluation team for an interview. Vendors will be contacted no later than 4 pm, November 16, 2023, regarding their interview status. Vendors advancing to the interview stage will receive an interview agenda at that time.

**7.3 Vendor Interview**

Vendors participating in this process shall explain and support their written proposal through a presentation, and question/answer forum. Vendor interviews will be November 29, 2023. Vendors must be available on this date to interview.

Vendors will be evaluated on the following criteria:

1. Explanation and support of the written proposal
2. The ability to best fulfill the County’s needs.

**Section 8 - Terms and Conditions**

**8.1** La Crosse County reserves the right to accept or reject any or all proposals or portions thereof without stated cause.

**8.2.** La Crosse County reserves the right to re-issue any requests for proposals.

**8.3.** Upon the selection of a finalist vendor, the County by its proper officials, employees, or agents shall attempt to negotiate and reach a final agreement with this vendor. If the County, for any reason, is unable to reach a final agreement with this vendor; the County reserves the right to reject such vendor and negotiate a final agreement with the vendor who has the next most viable proposal or bid. The County may also elect to reject all proposals and re-issue a request for proposal.

**8.4** Clarification of proposals: La Crosse County reserves the right to obtain clarification of any point in a vendor’s proposal or obtain additional information.

**8.5** La Crosse County is not bound to accept the proposal with the lowest cost but may accept the proposal that demonstrates the best ability to meet the needs of La Crosse County.

**8.6** La Crosse County may accept more than one (1) proposal if the County determines that accepting multiple proposals demonstrates the best ability to meet the needs of the County.

**8.7** The County reserves the right to waive any formalities, defects, or irregularities in any proposal, response, and/or submittal where the acceptance, rejection, or waiving of such is in the best interests of the County.

**8.8** The County reserves the right to disqualify any proposal, before or after opening, upon evidence of collusion, intent to defraud, or any other illegal practice on the part of the vendor.

**8.9** The Provider agrees to the fullest extent permitted by law, to indemnify, defend and hold harmless, the Purchaser, and its agents, officers and employees, from and against all loss or expense including costs and attorney fees by reason of liability for damages including suits at law or in equity, caused by any wrongful, intentional, or negligent act or omission of the Provider, or its (their) agents and / or subcontractors which may arise out of or connected with activities covered by this contract.

 **8.10** Provider agrees that to protect itself as well as the Purchaser and La Crosse County, its officers, Boards, and employees under the indemnity provisions set forth in the paragraph above, Provider will always, during the terms of this contract, keep in force insurance policies issued by an insurance company authorized to do business and licensed in the State of Wisconsin. Unless otherwise specified in Wisconsin Statutes, the types of insurance coverage and minimum amounts shall be as follows:

* Workers’ Compensation: minimum amount statutory
* Comprehensive General Liability: $1,000,000 per occurrence and in aggregate for bodily injury and property damage
* Auto Liability: $1,000,000 per occurrence and in aggregate for bodily injury and property damage
* Excess Liability coverage: $1,000,000 over the General Liability and Automobile Liability Coverage
* Errors and Omissions coverage: $1,000,000 per occurrence

 $1,000,000 in aggregate

**8.11** The Purchaser shall be given thirty (30) days advanced written notice of any
 cancellation or non-renewal of insurance during the term of this contract. Upon
 execution of this contract, the Provider will furnish Purchaser with written
 verification of the existence of such insurance. In the event of any action, suit, or
 proceedings against Purchaser upon any matter herein indemnified against,
 Purchaser shall within five (5) working days cause notice in writing thereof to be
 given to Provider by certified mail, addressed to its post office address. Purchaser
 shall cooperate with Provider and its attorneys in defense of any action, suit or other
 proceedings.

**8.12** The selected vendor shall not subcontract or assign any interest in the contract and
 shall not transfer any interest in the same without prior written consent of the
 County.

**8.13** No reports, information, or data given to or prepared by the firm under contract shall
 be made available to any individual or organization by the firm without the prior
 written approval of the County.

**8.14** Should the selected vendor merge or be purchased by another individual or firm
 contract continuation would be at the County's option.

**8.15** The successful vendor shall be required to sign a certification document stating
 they are not presently debarred, suspended, proposed for debarment, declared
 ineligible or voluntarily excluded from covered transactions by any Federal
 department or agency. If the successful vendor cannot, in good faith, sign the
 certification document the County reserves the right to reject such vendor and
 negotiate a final agreement with the vendor who has the next most viable
 proposal or bid. The County may also elect to reject all proposals and re-issue
 a request for proposal**.**