

JEFFERSON COUNTY, WISCONSIN

REQUEST FOR PROPOSAL

Professional Services to Conduct a Strategic Plan

CONTACT INFORMATION	
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SCHEDULE OF EVENTS	
The following dates are provided for your information and planning purposes. Although every effort will be made to follow this schedule, we reserve the right to modify the dates as necessary.	
RFP released:	March 2, 2023
Questions Due:	March 9, 2023
Amendment Issued:	March 10, 2023
Proposals Due:	March 16, 2023 – noon
Notice of Interviews:	March 17, 2023
Interviews, if required:	March 27 and 28, 2023
Executive Committee Approval:	March 29, 2023

REQUEST FOR PROPOSAL

PREPARATION, SUBMISSION, PROCESS AND AWARD

1. **COMMUNICATION**

This RFP is issued on behalf of Jefferson County by the Administration Department. The Staff assigned to this RFP, along with contact information, is noted on Page 1. This staff person is the sole point of contact during this process and no information provided by any other personnel will be considered binding.

The County prohibits communication initiated by the respondent to any County official, employee or representative evaluating or considering the proposals, prior to the time an award has been made.

All respondents should use this written document, its attachments, and any amendments as the sole basis for responding.

2. **ACCESS TO COUNTY BUILDINGS**

The Jefferson County Courthouse is currently under construction. The Administration Department is located at a temporary location of 302 S. Center Ave, Jefferson, WI 53549. The mailing address continues to be 311 S Center, Rm 111, Jefferson, WI 53549.

3. **CLARIFICATIONS/AMENDMENTS**

If you discover any significant ambiguity, error, omission, or other deficiency in the RFP, immediately notify the point of contact in writing via e-mail. All other questions, clarifications or exceptions regarding the RFP document must be raised prior to the submission of the proposal. We encourage you to submit preliminary questions based on the due dates. Please note the due dates and times noted on Page 1 for both preliminary and final questions. All questions must be submitted to the point of contact in writing, via email.

If it becomes necessary to clarify or revise any part of this RFP, amendments will be posted to the Jefferson County website and sent via e-mail; in accordance with the schedule on Page 1 to those who have registered in the county system. It is the responsibility of prospective vendors to check the website for any amendments prior to the opening date. All amendments must be acknowledged on the RFP Signature Page in the area provided. **Failure to do so may result in your response being rejected.**

4. **CONTENTS OF PROPOSAL**

All attachments, additional pages, addenda, or explanations supplied by the vendor with their proposal will be considered as part of the proposal response.

5. **NONCONFORMING TERMS AND CONDITIONS**

A response that includes contractual terms and conditions that do not conform to the contractual terms and conditions in the RFP document are **subject to rejection as nonresponsive**. Jefferson County reserves the right to permit the respondent to withdraw nonconforming terms and conditions from its response or negotiate changes to the contractual requirements prior to making a determination of responsiveness that are in the best interest of the county.

6. **AMENDMENT/WITHDRAWAL OF PROPOSALS BY VENDOR**

After receipt by the Administration Department, vendor proposals may only be amended 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 Administration Department.

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

7. **PROPOSAL FORMAT & SUBMISSION**

A. **Format**

Proposal Response documents may be submitted hard copy OR electronically. Response must include qualification to do the requested work, fee submittal, and examples of previous experience for similar projects.

Documents/attachments may be submitted as supplements to either your hard copy or electronic response, they should not be excessively long or in an elaborate format. They are not to be used in place of responding to the questions in the Proposal Response document, i.e. do not respond with "Reference Attachment". Unnecessary attachments beyond those sufficient to present a complete, comprehensive, and effective response should not be included.

B. **Mailing Address**

All hard copy submissions are to be mailed to:

Jefferson County Courthouse
Administration Department, Room 111
311 S. Center Avenue
Jefferson, WI 53549

C. **Hand Delivery**

If you are delivering your response in person, to 302 S. Center Ave, Jefferson, WI. Deliver it to the Administration Department receptionist.

D. **Response Submission - ELECTRONIC SUBMISSION:**

In lieu of a hard copy response, respondents may create an electronic response.

Fax to 920-675-0068 or

e-mail benjaminw@jeffersoncountywi.gov with a CC to tammiej@jeffersoncountywi.gov

E. **Response Receipt/Opening:**

Responses received after the due date and time may be rejected.

8. **INTERVIEWS**

Interviews **may** be required of selected finalists at the respondent's expense. However, an award may be made without discussion with the respondents. Therefore, respondents are cautioned that proposals should be submitted initially on the most favorable terms, from both a process, timeline, and cost standpoint.

If an interview is required, the selected finalists will be notified of the date and time of the interview process in accordance with the schedule on Page 1. Vendors not selected will also be notified.

Proposers not selected will be notified that their proposal will no longer be considered unless the evaluation committee finds, after the completion of interviews, that additional proposers should be interviewed.

9. **EVALUATION & AWARD**

Proposals will be evaluated in accordance with the criteria listed below. Award will be made to the responsive, responsible Contractor who complies with the requirements of the evaluation criteria as it pertains to the overall needs of Jefferson County.

Experience of firm in providing similar services
Qualifications of staff assigned to provide services outlined in proposal
Quality and completeness of Proposal including methods used to produce deliverables, process, ability to achieve timeline and adequacy in responding to the scope of services as defined in RFP
Cost

10. **OTHER CONSIDERATIONS**

Factors which include, but are not limited to, quantity involved, time of completion, purpose for which required, competency and financial capacity of vendor, ability to render satisfactory service and past performance will be considered in determining status as a responsible vendor. The County reserves the right to request additional information as may reasonably be required to make this determination and to further investigate the qualifications of the respondent as deemed appropriate.

11. **RESERVATIONS**

This RFP does not commit the County to pay any costs incurred in the preparation of a response to this request or to procure or contract for services or supplies. The Administration Department reserves the right to accept or reject any or all proposals received as a result of this request, request additional information, waive minor irregularities in the procedure, negotiate with any qualified source, or to cancel this RFP in part or in its entirety.

12. **NON-INTEREST OF COUNTY EMPLOYEES AND OFFICIALS**

No County official, employee or representative on the evaluation committee shall have any financial interest, either direct or indirect, in the proposal or contract or shall exercise any undue influence in the awarding of the contract.

**Jefferson County
Request for Proposal
Strategic Plan Update**

March 2, 2023

I. INTRODUCTION

Jefferson County is located between the metro areas of Milwaukee and Madison along the I-94 Corridor. This location provides a variety of opportunities and challenges for the county as it positions itself within these regions while maintaining the goals and values of the communities related to small town living and outdoor recreation. The balances between these two are crucial to the long-term success of the county as it relates to the organization operation and the quality of life related to its key stakeholder. The goal of the Strategic Plan is to help ensure guiding principles are in place to help guide elected officials and staff through key decisions for the long-term viability of the county.

II. BACKGROUND

Jefferson County embarked on updating its Strategic plan in 2017. This planning process was a significant undertaking with a desire by the County Board to have broad representation from various stakeholders across the County. The plan was adopted and then eventually updated in 2019 due to more targeted approach to certain strategic areas. Here is the link to the current [Strategic Plan](#).

After the plan being approved, the County embarked on greater interaction of the involvement of the strategic planning process to help guide the budget process. This has included the development of full inventory of programs and use of the Priority Based Budget Process in our budgeting. Here is the link to the [FY 2023 Budget](#). The Priority Based Budget Scoring Criteria can be found on p.28 of the pdf and is numbered p. 22 at the bottom.

One significant change anticipated in this Strategic Planning Process versus the past Strategic Plan Process is the starting point. A strategic task identified in the previous strategic plan was to accelerate the update of the County Comprehensive Plan and that it should be aligned with other plans the county works on to include the updating the Agricultural Preservation and Land Use Plan at the same time for greater alignment and shared goals. Both plans were approved in 2021. They can be found here:

- [County's Comprehensive Plan](#)
- [Agricultural Preservation and Land Use Plan](#)

There was a significant amount of public engagement through these processes to help with looking at the vision of the county for the future. In addition, significant time was spent during and after the process to work the implementation strategy. Here is a link to a document that provides a greater viewpoint on the implementation strategies for consideration in this process. [Jefferson County Implementation Plan](#)

Through this strategic planning process, our goal is to take the efforts related to the Comprehensive Plan Process and utilize the Strategic Planning process to prioritize and develop strategies to implement in 3–5-year iterations. There is also a recognition that reviews and updates on the implementation strategy need to be analyzed and revisited based on changes and efforts made since 2021 for validity, potential adjustments to include additions or deletion of tasks.

The goal of our process is a cycle that does the following:



The County's Executive Committee will be the sponsor of the Strategic Plan. The goal is to have conceptual strategies approved at the August 2023 County Board, with the intention of being able to help guide the policy decision making process when the County's Finance Committee begins their review of the proposed FY 2024 Budget in September. It is anticipated that these efforts to develop a plan will consist of the following facilitated efforts, but not limited to:

- Individual interviews with all thirty County Board Supervisors
- Individual/group interviews with certain appointed and elected Department Heads – up to 10
- Staff Facilitated meetings 3-5
- Potential Department Head Retreat (may be in lieu of some of the facilitated meetings)
- Executive Committee Facilitated meetings 5-7

These sessions may be adjusted between consultation of the recommended consultant and the County Administrator to best develop a planning process to achieve the timelines and desired outcomes.

Here is a link to a recent [Education Presentation](#) given to the County Board on the various plans and processes in anticipation of updating the Strategic Plan:

Other Plans – Below are links to various other plans that were done subsequent to the last Strategic Plan to help provide a full view of activity. This is not a full inclusive list.

Intergovernmental Collaboration:

- [Greater Than the Sum](#)
- [Taking the Pulse](#)
- [Parks, Open Space and Recreation Plan](#)
- [Health Strategic Plan](#)
- [Land & Water Resources Management Plan](#)

III. SCOPE OF SERVICES

JEFFERSON COUNTY seeks to retain a qualified firm to facilitate a strategic planning process and assist in the development of a new and comprehensive organizational strategic plan for JEFFERSON COUNTY. The Services to be furnished pursuant to this Request for Proposals ("RFP") may include, but are not limited to, the items listed below as needed.

The intent is for the chosen facilitator to work collaboratively with the Executive Committee and the County Administrator to develop the best approach and process that should be taken concerning the strategic plan development and ensure it meets established timelines, while ensuring appropriate input is included.

1. Develop a strategic planning process in collaboration with a team comprised of Jefferson County Board members and county staff under the direction by the Jefferson County Executive Committee. As part of this process, the county has estimated the number of meetings/sessions in updating this plan. It is recognized that this may change. For estimations that individual meetings will be an hour and facilitated sessions will be 3-4 hours.
2. Identify and validate the mission, vision, strengths, weaknesses, opportunities, and threats facing the Jefferson County.
3. Through a consensus driven planning process assist Jefferson County to validate and identify key strategic visions of the county. This will require an existing review of the current County's Comprehensive Plan, Strategic Plan, and the Executive Committee input to accomplish such.
4. Relying on the strategic planning process, assist in the development of an updated/revised Strategic Plan for Jefferson County with the primary intention of moving the implementation of the County's Comprehensive Plan forward.
5. Advise the Jefferson County Executive Committee and Administrator on implementing the Strategic Plan and evaluating the process toward achieving the goals established in the Plan and how it interacts with the Comprehensive Plan Implementation.
6. Advise the Executive Committee on establishing a framework to the organization to help achieve the goals established in the Plan to formal action plan steps and development of a monitoring schedule.
7. Advise the Executive Committee on potential rebranding efforts upon completion of the plan.

IV. QUALIFICATIONS

A professional strategic planning process facilitator with experience in both the private and public sector and expertise developing organizational strategic planning processes that help organizations develop a strategic vision, detail goals and then an operational plan to attain the goals. Expertise and skills to include:

1. Expertise designing strategic planning process.
2. Expertise integrating and facilitating multiple groups within the process, strategic planning and consensus building among stakeholders within a county setting.
3. Communications skills, stature, and presence to be credible and work and relate at all levels.
4. Expertise working efficiently while assuring full participation.
5. Highly skilled at translating the discussion outcomes into written strategies and implementation scorecards.
6. Preferred experience working with a local government entity.

V. PROPOSAL FORMAT

Proposals must include, at a minimum, the following information:

1. Experience of Firm - Provide a detailed description of the firm's experience providing the Services described in the Scope of Services set forth in this Request for Proposal including the type and number of clients served and the nature of the projects involved. Examples of successes achieved for past/present clients relating to the aforementioned Scope of Services are requested.
2. Experience/Qualifications of Assigned Professional(s) - Provide a resume for each individual who will be assigned to provide these services and designate the individual who would have primary responsibility for overseeing these services. Provide all relevant contact information for the primary contact person.

3. Sub-Consultants - Identify (if any) all sub-consultants (including names, addresses, current phone numbers, and e-mail addresses) to include a resume of related experience, how long the sub-consultant has worked with the consultant, and how many projects the sub-consultant has completed or is currently working on with the consultant.
4. Project Approach - Narrative that presents the services the firm will provide detailing the recommended approach, methodology, deliverables, client meetings, reports, etc.
5. Timeline - Timeline for the preparation and implementation of the tasks/activities being proposed in the Scope of Services.
6. Proposed Fees/Expenses - Proposals shall clearly state all fees and expenses to be charged for performance of all Services:
 - a. If based on an hourly rate, provide the hourly rates to be charged for each individual who would be assigned to this engagement, the anticipated total hours and a general description of how billable hours will be allocated among key personnel.
 - b. Provide an explanation if fees will be calculated on any other basis.
 - c. Itemize the type of expenses [other than fees] for which your firm would seek reimbursement.

It is anticipated that a maximum not to exceed amount will be established for these services; however, as the process is designed with the Executive Committee and County Administrator adjustments to final budget may be considered upon mutual agreement.

VI. **INTERVIEWS**

Interviews may be required of selected finalists at the respondent's expense. .

The County anticipates sending e-mail notification by March 17, 2023 to the respondents selected for an interview if needed. It is anticipated interviews will occur the afternoon of March 27 or the morning of March 28, 2023. The final recommendation of the proposed facilitator will be made to the Executive Committee on March 29th 2023. This meeting starts at 8:30 a.m.

END OF DOCUMENT