

**REQUEST FOR PROPOSAL (RFP) FOR  
TOWN OF SARATOGA, WOOD COUNTY  
SUSTAINABLE ENERGY ECONOMIC STRATEGY**

<b>Issued by:</b>	<b>NCWRPC</b>
<b>Contract Period:</b>	<b>June 1, 2022 – March 31, 2023</b>
<b>Estimated Funding:</b>	<b>Not to exceed \$40,000</b>
<b>Questions/Clarification Period</b>	<b>All questions about this RFP must be emailed to the Contract Point of Contact by <u>May 6, 2022</u>. To ensure fair and open competition, all questions received will be answered and posted at <a href="http://www.ncwrpc.org">www.ncwrpc.org</a>.</b>
<b>Submission Requirements:</b>	<b><u>Proposals due by 5:00pm CST on Friday, May 16, 2022</u> One (1) clearly marked ORIGINAL and five (5) COPIES must be received, in the mail or delivered in person, by the Contract Point of Contact prior to the time and date indicated above. For document integrity purposes, no proposals will be accepted by email or fax.</b>
<b>Contract Point of Contact:</b>	<b>Dennis Lawrence, Executive Director North Central Wisconsin Regional Planning Commission 210 McClellan Street, STE 210 Wausau, WI 54403 715-849-5510 <a href="mailto:dlawrence@ncwrpc.org">dlawrence@ncwrpc.org</a></b>

The Town of Saratoga, along with the North Central Wisconsin Regional Planning Commission (NCWRPC) are submitting for your consideration a Request for Proposal (RFP) to undertake consultant services to prepare an Economic Strategy for the Town of Saratoga. Recently the town has had two large solar energy developments locate within the Town. The goal with this economic strategy is to analyze impacts and opportunities for the community to capitalize upon these projects to develop a sustainable community plan.

The following are the terms, conditions and Scope of Work of this Request for Proposals. It is the consultant's responsibility to ensure the RFP is complete, timely and received by the NCWRPC as stated above. Any RFP submitted shall be binding for sixty (60) calendar days following the RFP opening date. Funding maximum budget for this proposal is \$40,000.

Proposals demonstrating the ability to perform all elements of the contract at lower costs will receive special consideration as noted in Section C. Elements of Proposal and Proposal Rating Criteria. The sources of the funding for this Study come from: the U.S. Department of Commerce – Economic Development Administration (EDA), and local match funds from the community.

The Town and NCWRPC reserve the right to accept the proposals in whole, or in part, and to reject any and all proposals and negotiate separately or solicit new proposals to better serve its interests without penalty. This Request for Proposals does not commit the Town and NCWRPC to award a contract nor to pay for costs incurred by successful or unsuccessful consultants in the preparation or presentation of their proposals. The NCWRPC will issue written notification of its selection decision to both the successful and unsuccessful consultants.

## **A. Background**

Over the last few years two major solar projects have located in the community. The Town needs to plan accordingly as well as to explore opportunities related to solar energy – such as supply chain opportunities, design and layout of concerns, and opportunities for future growth for development, land use and housing. An EDA grant was obtained to assist in this effort. The first phase, which is underway, is the preparation of issues and conditions report for the town. Those may provide some background information to the next phase – the Sustainable Energy Economic Strategy.

## **B. Scope of Work**

This project involves preparing a Sustainable Energy Economic Strategy over a six to nine month period.

### **1. Economic Assessment & Strategy**

The Sustainable Energy Economic Strategy will focus on identifying specific goals, objectives, and strategies for the community in context with the solar developments. The strategy should explore opportunities related to specific focus areas including supply chain connections, existing development, and new business areas. Specifically, the Town wants to examine opportunities to expand or capitalize on the solar energy sector.

The Strategy is envisioned to promote the stabilization, retention and expansion of the economic base following the development of the solar projects. The community hopes to build off these to promote related development.

The consultant will prepare a Strategy that includes three basic sections:

- Evaluate the town's economic strengths and weaknesses
- Develop realistic goals and objectives that will guide economic development efforts
- Identify strategies for development, land use and housing

#### a. Evaluate Strengths and Weaknesses

This section should describe the area's economy, highlight the most significant findings, and identify the community's place in the market and identify primary opportunities and challenges. There should also be some discussion of long-term solar impact and remediation of sites in the future. Any environmental or other concerns should be identified.

Through data collection and research conduct a community assessment and frame the key issues most affecting the community's economic growth. Data collection and research would consider such items as demographics, utilities, housing, natural resources, community facilities, transportation, and land use within Saratoga. Research will also include a review of existing community plans and current economic development efforts at the local, county, and regional levels. Identify feasible growth and development options, given the external environment and internal opportunities and constraints. Assessment of available land resources for various future developments should be discussed.

Stakeholder interviews should be included in the process to gather local and regional perspectives on current economic development efforts and community strengths and opportunities. Possible interview candidates include local business owners, property owners, local economic development facilitators, regional economic development or real estate representatives, and industry representatives associated with specific focus areas.

Local market conditions will be summarized and existing industry opportunities, supply chain connections, market demand gaps and potential economic opportunities within the area as well as in surrounding markets.

#### b. Develop Realistic Goals, Objectives, and Actions

The strategy will also include an action plan, which will create the blueprint for both short-terms and long-terms tasks (five and ten years) for the town to implement. The strategy will also include a detailed timeline for future initiatives, information on potential partners, and anticipated costs.

This section should develop goals and objectives based on the findings from the first section and make a connection to the newly developed comprehensive plans. Detailed actions steps would be provided to maximize or create opportunities or minimize threats to achieve economic goals. These actions should be prioritized and based on the best approach and overall return. There should be an identification of industry sectors, including solar energy, for business attraction based on information from the earlier section.

The Strategy should include the sequence of tasks necessary to achieve the goals and objectives. This includes defining action steps to implement the strategy – a step by step guide. Engage community stakeholders to inform and review the plans of action.

c. Strategy

Prepare document and maps. Anticipated document would include background discussion, economic assessment, opportunities, strategy, graphics & maps, as well as goals, objectives and policies. A work plan would be desirable.

Deliverable: Provide the one digital copy of document that can be edited for future updates, one copy in PDF format; and 10 color paper copies of the final study.

2. Meetings.

A minimum of three in-person Stakeholder meetings need to occur during this process. Additional on-line/Zoom meeting updates, telephone calls, etc. are expected.

Deliverable: Consultant shall attend and participate in at least 3 local meetings coordinated by the Town to receive input from elected officials, stakeholders, and residents on needs, information sources, ideas, regional resources, networking capacity, and to answer questions and report on findings. Tentatively called Kick-Off, Strategy Development, and Presentation.

3. Progress Reports.

Provide written reports.

Deliverable: Monthly written progress updates to the Town and NCWRPC.

4. Invoices.

A total of three invoices will be submitted to the NCWRPC as the fiscal agent.

Deliverable: Detailed invoices must be submitted for services rendered. Reimbursement will be made based on services and costs outlined in invoices. All activities contained on the invoice for reimbursement must be allowable as per the scope of work outlined in this RFP. Unapproved activities will not be reimbursed.

**C. Elements of Proposal and Proposal Rating Criteria (100 points possible)**

Proposal Cover Sheet: On a separate sheet that will serve as the cover of your proposal include the following:

- “Economic Strategy Proposal”
- Organization Name
- Organization Address
- Contact Person’s Name
- Contact Person’s Telephone Number
- Contact Person’s E-Mail Address
- Cost of Services using the following cost categories:
  - Personnel,
  - Travel,
  - Subcontracts, and
  - Supplies with a
  - Total Cost listed on a not to exceed basis.

Proposal Format, to include (with point weighting):

**Statement of Qualifications: 15 points**

The consultant shall provide a description of their history, size, location, existing and staff longevity. The consultant shall also provide a description of their expertise in: economic development, business incubation, and workforce development activities. Points will be awarded based on firm's overall qualifications and ability to meet the timeline. Provide at least three references on similar projects that have been completed in the last 5 years by your organization.

**Proposed Approach to Complete the Study: 50 points**

Provide a summary of the approach and methodologies you plan to use to accomplish the Scope of Work and other RFP requirements. Points will be awarded based on the overall approach toward fulfilling the Economic Adjustment Strategy outlined in B.1 of this RFP. Points will also be awarded for additional ideas or approaches.

**Name and background of the individual(s) who would be assigned to the project: 20 points**

Identify specific personnel, their experience and qualifications that will be assigned to the project and the number of hours each will spend on the project. The list shall be organized to show personnel and time commitments in relation to the activities outlined in the Scope of Work, Other RFP Requirements and the Schedule of Deadlines above. Please provide resumes for all staff and identify the individual that will lead the project and serve as the main contact for the project. Points will be awarded based on the experience and familiarity of the staff assigned to this project.

**Timeline: 5 points**

Provide an overview of the timeline, including benchmarks and other critical dates. The Town anticipates a six-to-nine-month period from start to finish. Points will be awarded based on the reasonableness of timeline and record of completing similar projects within timeframe.

**Cost of Services: 10 points**

Provide a detailed breakdown of all costs. Use the following categories to itemize your Cost of Services: Personnel (including staff assigned, total hourly commitment of each staff and hourly billable rates), Travel, Subcontracts, and Supplies. PROVIDE A COST NOT TO EXCEED FIGURE FOR THIS REQUEST FOR PROPOSAL. Points will be awarded based on the reasonableness of itemized costs, including cost effectiveness of overall proposal. Proposals coming in under the maximum award will receive special consideration for cost effectiveness.

**D. Submission of Proposals**

**Deadline:** Proposals shall be delivered by U.S. mail to the Contract Point of Contact on or before May 16<sup>th</sup>, 2022, at 5:00 p.m. CST. The Town/NCWRPC will not be liable for any costs incurred by the proposer in responding to this RFP or participating in the RFP process.

**Submission of Proposal:** One (1) clearly marked ORIGINAL and five (5) COPIES must be received, in the mail or delivered in person, to the Contract Point of Contact prior to the time and date indicated above.

For document integrity purposes, no proposals will be accepted by email or fax. Proposals must be on standard 8 1/2" X 11" paper, 11-font or larger, single spaced. Page limit for proposals is ten (10), not including the cover page, resumes of staff, and other related information. Proposals should be securely bound.

Any proposals that are submitted after the deadline or that do not follow the instructions for submission will be deemed non-responsive and will not be considered.

#### **E. Process to Select Consultant**

The consultant selection process will involve evaluation of consultant's responses to the elements of Proposal described above. Interviews will then be scheduled either in person or teleconference with the top three highest scoring proposers. Interviews will include separate scoring criteria which will be added to the proposal scores for a total.

If the Town/NCWRPC and selected consultant are unable to reach an agreement on the Scope of Work and other RFP requirements and/or compensation, the Town/NCWRPC will terminate discussions and begin negotiations with the next ranked proposer.

The Town/NCWRPC reserve the right to reject any or all proposals. The Town/NCWRPC reserve the right to accept the proposals in whole, or in part, and to reject any and all proposals and negotiate separately or solicit new proposals to better serve its interests without penalty.

This Request for Proposals does not commit the Town/NCWRPC to award a contract nor to pay for costs incurred by the successful or unsuccessful proposers in the preparation of their proposals. The NCWRPC will provide notification of the selection decision to both the successful and unsuccessful proposers.

#### **F. Amendments, Addenda or Questions**

The Town/NCWRPC reserve the right to modify or issue amendments to this RFP. If questions result in the modification of this RFP, the written modifications will be posted. All questions about this RFP must be emailed to the Contract Point of Contact. To ensure fair and open competition, all questions specific to the RFP should be received by May 6<sup>th</sup> and will be answered and posted at [www.ncwrpc.org](http://www.ncwrpc.org) by May 10<sup>th</sup>. General questions for clarification or on process will be accepted until submission deadline.

#### **G. Withdrawal of Proposals**

Proposals may be withdrawn at any time by notifying the Contract Point of Contact in writing.

#### **H. Insurance**

If selected, the consultant shall provide appropriate levels of insurance coverage, see below.

#### **I. Contract Time Period**

The term of the contract will be consistent with the Timeline below:

- |  |                |
|--|----------------|
| 1. RFP issued:   | April 20, 2022 |
| 2. RFP deadline:   | May 16, 2022   |
| 3. Contract awarded, and parties of unsuccessful proposals notified: | June 15, 2022  |

- 4. Consultant collects and analyses data, conduct research and holds meetings.
- 5. Consultant submits draft of strategy to Town/NCWRPC: Feb. 15, 2023
- 6. Consultant presents final strategy to Town/NCWRPC: March 2023
- 7. Final Invoice submitted for reimbursement by: March 31, 2023

**J. Professional Services Liability Insurance**

It is to be agreed that the Town/NCWRPC or the insurance they carry will not contribute to a loss by the consultant. The following levels of insurance are required to be in place to indemnify the consultant from any losses incurred by this project. If circumstances exist where coverage or liability amounts are not obtainable or practical the Town/NCWRPC may waive coverage and liability amounts. Claims-made form of coverage is not acceptable.

Commercial General Liability

- (1) \$1,000,000 each occurrence limit
- (2) \$1,000,000 personal liability and advertising injury
- (3) \$2,000,000 general aggregate
- (4) \$2,000,000 products - completed operations aggregate

Insurance must include:

- (1) Premises and Operations Liability
- (2) Contractual Liability
- (3) Personal Injury
- (4) The general aggregate must apply separately to this project location

Business Automobile Coverage

\$500,000 combined single limit for Bodily Injury and Property Damage each accident  
Must cover liability for - "Any Auto" - including Owned, Non-Owned and Hired Automobile Liability.

Workers Compensation and Employers Liability

Must carry coverage for required Statutory Workers Compensation and an Employers Liability limit of:

- (1) \$100,000 Each Accident
- (2) \$500,000 Disease Policy Limit
- (3) \$100,000 Disease - Each Employee

Additional Provisions

Acceptability of Insurers - Insurance is to be placed with insurers who have an AM Best rating of no less than B+ and a Financial Size Category of no less than Class VI, and who are authorized as an admitted insurance company in the state of Wisconsin.

Additional Insured Requirements – The Town of Saratoga and NCWRPC along with its agents, employees and authorized volunteers must be named as additional insureds on the General Liability and Business Automobile Liability coverage arising out of project work. This does not apply to Workers Compensation and Employers Liability.

Certificates of Insurance acceptable to the NCWRPC shall be submitted **prior** to commencement of the work to the Contract Point of Contact. These certificates shall contain a provision that coverage afforded under the policies will not be canceled or non-renewed until at least 30 days' prior written notice has been given to the Contract Point of Contact.

**K. Other Information**

While this economic develop strategy is being developed an update of the Town's Comprehensive Plan is underway. The intent is that some of the information from this effort will be incorporated into the plan such economic development, land use, maps & graphics, among other material.

See the Town of Saratoga's website for general information and for information about the local solar projects.