



City County Building, Room 362
210 Martin Luther King Jr. Boulevard
Madison, WI 53703
608-266-4137
www.capitalarearpc.org

REQUEST FOR PROPOSALS

SCENARIO PRESENTATION AND PUBLIC POLLING WEBSITE

Issue Date: December 4, 2017

Due Date: 2:00 p.m. CST, January 10, 2018

Return To: steves@capitalarearpc.org
Steve Steinhoff, Deputy Director
Capital Area Regional Planning Commission
210 Martin Luther King, Jr. Blvd., Room 362
Madison, WI 53703

Notice and Instructions to Bidders

1. Proposals must be received by the above recipient no later than the due time and date or they will be considered late and will be rejected.
2. Submit the Signature Affidavit (Form A) as the first pages of the proposal.
3. Include all required information and/or certifications as stated in Section C.
4. All proposals must be clearly labeled in the lower left hand corner:

[Proposer Name and Address]
Scenario Presentation and Public Polling Website
[time], [date], 2018

For questions regarding this RFP, contact:

Steve Steinhoff, Capital Area Regional Planning Commission

Phone: 608-266-4593
Email: steves@capitalarearpc.org

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SECTION A: GENERAL RFP ADMINISTRATIVE INFORMATION

1. DEFINITIONS

“Bid,” “proposal,” “offer,” and “contract” are synonymous.

2. ADDENDA

Revisions to any part of the RFP or provision of additional information shall be made by addenda. Proposers must acknowledge the receipt of any addendum in Form A, Part II. Failure to retrieve such addenda and include their appropriate provisions in the proposer’s response may result in the proposer’s proposal being disqualified.

3. ORAL PRESENTATIONS AND INTERVIEWS

See paragraph 3.4 in Section C on page 8 for information.

4. ACCEPTANCE/REJECTION OF PROPOSALS

4.1 CARPC reserves the right to accept or reject any or all proposals submitted, in whole or in part, and to waive any informalities or technicalities, which at CARPC’s discretion is determined to be in the best interests of CARPC. Further, CARPC makes no representations that a contract will be awarded to any proposer responding to this request. CARPC expressly reserves the right to reject any and all proposals responding to this invitation without indicating any reasons for such rejection(s).

4.2 CARPC reserves the right to postpone due dates and openings for its own convenience and to withdraw this solicitation at any time without prior notice.

5. INCURRING COSTS

This RFP does not commit CARPC to award a contract, pay any costs incurred in preparation of proposals, or to procure or contract for services, products, or equipment.

6. PROPOSER’S RESPONSIBILITY

Proposers shall examine this RFP and contract documents and shall exercise their own judgment as to the nature and scope of the work required. No plea of ignorance of conditions or difficulties that exist or may hereafter arise in the execution of the work under this contract as a result of failure to make necessary examinations and investigations, shall be accepted as an excuse for any failure or omission on the part of the proposer to fulfill the requirements of the contract.

7. PROPOSER QUALIFICATIONS

CARPC may make such investigations as it deems necessary to determine the ability of the proposer to perform the work, and the proposer shall furnish to CARPC all such information and data for this purpose as CARPC may request. CARPC reserves the right to reject any proposal if the evidence submitted by, or investigated of, such proposer fails to satisfy CARPC that such proposer understands the full scope of work and is properly qualified to carry out the obligations of the contract and to complete the work contemplated herein.

8. WITHDRAWAL, REVISION, AND CLARIFICATION OF PROPOSALS

8.1 A proposer may, without prejudice, withdraw a proposal submitted prior to the due date and time by requesting such withdrawal in writing before the due time and date for submission of proposals. Telephone requests for withdrawal will not be accepted. After the due date of submission of proposals, no proposal may be withdrawn by the proposer for a period of 90 days or as otherwise specified or provided by law.

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- 8.2 A proposer may, without prejudice, modify their proposal at any time prior to the due date and time. The proposer shall submit the revision to CARPC indicating the date of the revision, revision number, and instructions describing which pages or sections of the proposal to remove and insert.
- 8.3 A proposer may, without prejudice, clarify their proposal with email communication with CARPC. A clarification may be a minor revision, an update to information contained in the proposal since the proposal was delivered, or a similar small change. At CARPC's discretion, the proposer may be required to complete a modification described in Section 8.2 above.

9. DESIGNATION OF PROPRIETARY INFORMATION

- 9.1 All restrictions on the use or inspection of data contained within a proposal shall be requested by the proposer with the submission of the proposal.
- 9.2 Requests that are granted shall conform to the following standards:
 - Any information to be considered confidential or proprietary must be clearly stated on the attached Form C and separated from the rest of the proposal.
 - Neither a proposal in its entirety nor proposal price information will be considered confidential and/or proprietary.
 - Any information that will be included in any resulting contract cannot be considered confidential.
- 9.3 Proprietary information submitted in a proposal, or in response to the RFP, will be handled in accordance with the applicable Wisconsin state statute(s). To the extent permitted by law, it is the intention of CARPC to withhold the contents of the proposal from public view until such times as competitive or bargaining reasons no longer require non-disclosure, in the opinion of CARPC. At that time, all proposals will be available for review in accordance with the Wisconsin Open Records Law.

10. INQUIRIES AND CLARIFICATION OF SPECIFICATIONS

This RFP is administered by CARPC. All inquiries for clarification or additional information need to be submitted in writing by December 8th (see Section B.3. (Calendar of Events and Timeline)). Questions about the RFP should be submitted to Steve Steinhoff (see the RFP cover page for contact information).

Proposers are expected to raise any questions necessary to prepare a proposal. All clarifications and additional information that CARPC determines may be pertinent to other proposers will be posted on its website (www.capitalarearpc.org) as addenda and emailed to any proposers who request that addenda be sent to them electronically.

SECTION B: PROJECT INFORMATION

1. BACKGROUND AND PROJECT DESCRIPTION

A Greater Madison Vision (AGMV) is a public-private initiative with a goal to produce an actionable and compelling vision and plan for growth and development for the next 30 years in the Greater Madison Region, defined as Dane County and those parts of the surrounding counties that share common regional economic, transportation, and natural resource connections. AGMV is led by a 46-member Steering Committee comprised of people from a wide variety of businesses, organizations, governments, interests, and institutions who represent a cross-section of the region. Support is provided by the staff and commissioners of the Capital Area Regional Planning Commission, a public agency representing municipalities in Dane County and focused on collaborative land use and environmental planning.

Since September 2015, the AGMV Steering Committee and CARPC staff have commissioned a values survey, built organizational capacity, partnered with local communities and other regional organizations, and conducted stakeholder and community outreach and engagement. Steering Committee members, stakeholders, and staff have used these sources of information to begin to create a set of exploratory scenarios of future growth that embody different values, priorities, and challenges.

AGMV seeks to engage residents from across the Greater Madison Region in a scenario voting exercise on an interactive website platform that will generate at least 10,000 completed surveys. CARPC seeks a website designer with experience in public engagement for planning initiatives to build and maintain a website to convey various elements of a series of regional development scenarios to the public and enable a large-scale public voting exercise on these scenarios. The target audience is a geographically and demographically representative sample of the region. The audience’s choices in the survey will inform the plan, as well as the recommendations and implementation strategies that result.

2. PROCURING AND CONTRACTING AGENCY AND PROJECT OVERSIGHT COMMITTEE

- 2.1 This RFP is issued by, and the contract resulting from this RFP will be administered by, CARPC.
- 2.2 The proposer’s work may be directed by a project oversight committee consisting of staff from CARPC and/or other local agencies and organizations. The exact make-up of the project oversight committee, if formed, is expected to be determined before the contract start date.

3. CALENDAR OF EVENTS AND TIMELINE

Listed below are specific and estimated dates and times of actions related to this RFP.

DATE	EVENT
Dec 4, 2017	Date of issue of the RFP
Dec 15, 2017	Deadline for submitting written inquiries
Dec 22, 2017	Response to inquiries provided to proposers
2:00 p.m. CST, Jan 10, 2018	Proposals due from proposers
Jan 17-19, 2018	Oral presentations and/or interviews (if scheduled)
Jan 26, 2018	Contract award date
Feb 9, 2018	Contract start date
Apr 30, 2018	Scenario polling website operational
Jul 27, 2018	Project completion

These dates are for planning purposes. They represent the desired timeline for implementing this project. The timeline may be adjusted, however, based upon the proposer’s recommendations, proposal responses, production needs, and other circumstances.

4. FUNDING

The amount of funding budgeted for this project is no more than \$50,000. CARPC is looking for an economical solution that will achieve the overall goals of the project.

SECTION C: PROPOSAL

1. PROPOSAL CONTENT

The evaluation and selection of a consultant and the contract will be based on the information submitted in the proposal plus references and any required oral presentations and interviews. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a proposal.

There is no set page limit for the proposal. However, proposers are encouraged to submit succinct proposals.

2. PROPOSAL ORGANIZATION AND FORMAT

The proposal should include four sections are described below.

• **SECTION 1 – General Information and Signatures**

Cover Letter

Includes a brief description of the proposer’s company and summary of the proposed services.

Signature Affidavit (Form A, Part I and Part II)

Submit this affidavit as the first pages of the proposal. Include the legal name of the proposer and signature of the person(s) legally authorized to bind the proposer to a contract.

• **SECTION 2 – Proposer Information**

Proposer Profile (Form B)

- Provide business identification and contact information required in the form.

Qualifications

- Provide a brief overview of the general background and services provided by the proposer’s firm, including size of organization, description of organization structure, and relevant website design experience.
- Identify key staff from the proposer’s firm and its affiliates to fulfill the contract requirements, and their qualifications. Identify a project manager(s) (the project manager cannot be from an affiliate).

Experience

- The Evaluation Committee will evaluate the experience of the proposer in providing the proposed services. Provide a description of relevant experience, especially in projects of similar size and scope. Be specific and identify projects, dates, and results.

References

- CARPC may also utilize other sources of information about the product(s) and/or service(s) proposed where these sources are publicly available and are equally available for all competing proposers.
- Provide a list of organizations and/or clients with whom the proposer has done similar business within the last five years. Include the name, address, and phone

number of a contact person for each. Describe briefly the nature of the project or services provided to each organization or agency listed.

- CARPC will determine which, if any, references to contact to assess proposer qualifications and personnel. The proposer will not be present during any reference checks. The results of any reference checks may be provided to the Evaluation Committee and may be used when scoring the written proposal. Proposed subcontractors cannot be listed as references.

- **SECTION 3 – Work Plan**

Submit a work plan that outlines the proposed tasks and timeline for completing this project.

- **SECTION 4 – Staffing Proposal**

Submit a staffing proposal. The proposed work should be broken out by task, and the individual(s) and any subcontractors to be assigned to the task.

- **SECTION 5 – Cost Proposal**

Submit a cost proposal, not to exceed \$50,000, that identifies the costs for each component of the work plan.

3. PROPOSAL SELECTION AND AWARD

3.1 Evaluation Committee

An Evaluation Committee will be formed to evaluate the proposals.

3.2 Evaluation Criteria

In making their selection under this RFP, CARPC and the Evaluation Committee will consider the proposals, project approaches, general qualifications, prior history of performance, and presentations and interviews (if conducted).

CARPC will have sole discretion as to the methodology used in making the award. The award will be made to the responsible and responsive proposer who offers the best combination of the following, but not limited to: qualifications, experience, capability, management, accountability, past and current performance, adherence to applicable state and federal regulations, location, project approach, and staffing proposal in compliance with the specifications and requirements of this RFP.

3.3 Proposal Evaluation

Received proposals will be reviewed for completeness and compliance with this RFP. All incomplete proposals submitted may be determined to be nonresponsive and removed from the evaluation process. To be considered complete, proposals shall include all required submittals listed in the checklist (Form A - Part II) and shall be signed and dated. In the event that all proposers do not meet one or more of the requirements, CARPC reserves the right to continue the evaluation of the proposals that most closely meet the requirements of this RFP.

Accepted proposals will be reviewed by the Evaluation Committee and scored against evaluation criteria. The committee may review references and request oral presentations and/or interviews, and use the results in scoring the proposals.

During the evaluation of proposals, CARPC reserves the right to contact any or all proposers to request additional information for purposes of clarifying of proposals, reject proposals which contain errors, or, at its sole discretion, waive disqualifying errors.

3.4 Oral Presentations and Interviews

The Evaluation Committee will make the final selection and recommendation following the evaluation of the proposals which may include oral presentations and/or interviews, if deemed necessary, with some or all of the proposers. However, CARPC may make final selection(s) on the basis of the original proposals only, without oral presentations or interviews with any proposers. If an interview is conducted, the Evaluation Committee may re-evaluate, re-rate and/or re-rank the finalists' proposals based upon the written documents submitted and any clarifications offered in the oral presentations and interviews.

An oral presentation shall consist of a proposer presenting the contents of their proposal to an audience consisting of, but not limited to, the Evaluation Committee. An interview shall consist of a meeting between members of the Evaluation Committee, the proposer, and potentially other parties, and the proposer will be expected to answer questions intended to clarify parts of their proposal.

3.5 Best and Final Offer

Proposers shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals, and such revisions may be permitted after submissions and prior to award for the purpose of obtaining best and final offers. In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing proposers. If best and final offers are requested, they will be evaluated against the evaluation criteria, scored, and ranked.

3.6 Termination and Suspension of the RFP Process

At any time, CARPC reserves the right to terminate, suspend, or modify this selection process; reject any or all submittals; and waive any informalities, irregularities, or omissions in submittals, all as deemed in the best interests of CARPC.

3.7 Communication with Evaluation Committee

Proposers may not contact members of the Evaluation Committee at any time during the evaluation process, except at CARPC's request. See Section A-10 for Inquiries and Clarifications.

3.8 Right to Reject Proposals and Negotiate Contract Terms

CARPC reserves the right to reject any and all proposals and to negotiate the terms of the contract, including the final composition of the consultant team, contract amount, scope of services, and final fees with the selected proposer(s). If contract negotiations cannot be concluded successfully with the highest scoring proposer(s), CARPC may negotiate a contract with the next highest scoring proposer.

SECTION D: SCOPE OF WORK

1. INTRODUCTION

The following is an overview of the proposed scope of work. The scope includes both general and specific descriptions of tasks which proposers should build on, adding or altering tasks as deemed appropriate, and proposing more detailed subtasks. The proposer should feel free to propose alternative methods and techniques, where appropriate.

At a minimum, the proposer must propose a scope of work describing individual work tasks, and summarizing the work products and deliverables associated with each task. The proposer should follow the format described herein, to the greatest extent possible. However, the proposer should also feel free to demonstrate their unique abilities, creativity, and/or experience to perform the various work tasks. Further, the proposer may wish to expand upon certain work tasks and identify additional deliverables, showing how such alternative approaches would be beneficial to the project.

2. TASK 1: PROJECT MANAGEMENT PLAN

Prepare a project management plan, which will refine the contract scope of work and be used to guide and monitor the project. The project management plan will specify the roles and responsibilities of the proposer and other project participants, identify specific work tasks, sub-tasks, and review/comment points, and provide a detailed schedule of work, including major milestones that must be met before further work can be authorized.

3. TASK 2: SCENARIO POLLING WEBSITE

Describe how the scenario polling website will be developed and how it will enable diverse members of the public to explore three or four future growth scenarios and answer survey questions about their scenario preferences. Describe the website technology that will be used. CARPC will register the domain name and prefers to use its hosting company. Describe how the proposer will work with CARPC in an iterative process to review and provide feedback on options and drafts. The website should be intuitive, engaging, and informative; providing quick access to summary information with the option of exploring scenarios in more detail. CARPC will provide scenario content information, including text and map graphics. Proposer is expected to create website design and provide supplemental graphics. The website's content must be able to be displayed in English, Latin American Spanish, and Hmong, all of which must adhere to Section 508/WCAG 2.0 guidelines for accessibility.

4. TASK 3: SCENARIO SURVEY

Describe how the survey will be developed to ask questions that integrate with the scenario polling website. The proposer will work with CARPC to design survey questions that generate data that will enable the AGMV Steering Committee to determine regional preferences for different aspects of each scenario. Describe how the website will enable survey results to be generated in raw data form, and in summary reports during and after the survey is open. Describe how survey results will be available by demographic and geographic breakdowns. Describe how the survey instrument will address the potential for multiple survey completions by individual people. The AGMV Steering Committee and CARPC will be responsible for marketing the scenario survey and driving people to the website.

5. TASK 4: SCENARIO SURVEY WEBSITE MANAGEMENT

Describe how the website will be managed and maintained during the project period to eliminate downtime and troubleshoot problems.

6. PROJECT DELIVERABLES

Project deliverables include:

- Project management plan
- Website map detailing the structure, design, and function of the website
- Scenario polling website
- Scenario survey

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- Website analytics reports
- Website maintenance and support services

The ownership of all documents, files, domains, websites, and work materials generated, including, without limitation, data analysis, photographs/illustrations, meeting notes, and the report document will be transferred to CARPC at the end of the project.

SIGNATURE AFFIDAVIT

Note: This form must be returned as the first pages of the proposal.

PART I: Free Competition Disclosure

In signing this proposal, we certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the opening of proposals to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

The undersigned, submitting this proposal, hereby agrees with all the terms, conditions, and specifications required by CARPC in this Request for Proposal, and declares that the attached proposal is in conformity therewith.

Proposer shall provide the complete information requested below. Include the legal name of the proposer and signature of the person(s) legally authorized to bind the proposer to a contract.

Proposal Invalid Without Signature	
SIGNATURE OF PROPOSER:	DATE:
NAME AND TITLE OF PROPOSER:	COMPANY NAME:
TELEPHONE:	ADDRESS:
EMAIL:	

Person to be Contacted if There are Questions about the Proposal (if different from above)	
NAME:	TITLE:
TELEPHONE:	EMAIL:

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FORM A

PART II: RECEIPT FORMS and SUBMITTAL CHECKLIST

The undersigned hereby acknowledges the receipt and/or submittal of the following forms (initial all applicable forms):

Request for Proposal	Initial to acknowledge receipt of RFP documents	Initial for all submitted documents
Section A: General RFP Administrative Information		
Section B: Project Information		
Section C: Proposal		
Section D: Scope of Work		
Form A (Parts I and II): Signature Affidavit		
Form B: Proposer Profile		
Form C: Designation of Confidential and Proprietary Information		
See Section C for definitions of the following:		
Section 1	General Information and Signatures <ul style="list-style-type: none"> • Cover Letter • Signature Affidavit (Form A Parts I and II) 	
Section 2	Proposer Information - - SUBMIT ONLY CHANGES TO INFORMATION SUBMITTED IN RESPONSE TO RFP <ul style="list-style-type: none"> • Proposer Profile (Form B) • Qualifications • Experience • Proposer References 	
Section 3	Work Plan	
Section 4	Staffing Proposal	
Section 5	Cost Proposal	
Section 6	Additional Documents <ul style="list-style-type: none"> • Designation of Confidential and Proprietary Information (Form C) 	

Company Name (print or type)

Proposer's Name and Title (print or type)

Date

Signature

PROPOSER PROFILE

- 1. **Proposing Company Name:** _____

- 2. FEIN _____ OR (If Sole Proprietorship, provide SSN upon award, if FEIN is N/A)
DUNN AND BRADSTREET NO. _____

- 3. **Form of Organization:** Corporation Limited Liability Company General Partnership
 Sole Proprietor Unincorporated Association Other: _____

- 4. **Location of Main Office:**
ADDRESS _____ CITY _____ STATE _____ ZIP _____

- 5. **Location of Office Servicing Dane County:**
ADDRESS _____ CITY _____ STATE _____ ZIP _____

- 6. **Principal Information and Contact:**
NAME _____ TITLE _____
TEL _____ TOLL FREE TEL _____
FAX _____ E-MAIL _____

- 7. **Proposer's Contact Information (if different from above):**
NAME _____ TITLE _____
TEL _____ TOLL FREE TEL _____
FAX _____ E-MAIL _____

- 8. **Orders and Billing Contacts and Mailing Address:**
NAME _____ TITLE _____
TEL _____ TOLL FREE TEL _____
FAX _____ E-MAIL _____
ADDRESS _____ CITY _____ STATE _____ ZIP _____

DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

The material submitted in response to this solicitation documentation includes proprietary and confidential information which qualifies as a trade secret, as provided in in Wis. Stat. § 19.36(5), or is otherwise material that can be kept confidential under the Wisconsin Open Records Law. As such, we ask that certain pages, as indicated below, of this proposal response be treated as confidential material and not be released without our written approval. We request that the following pages not be released:

Section	Page No.	Topic

This does not apply to proposal prices. Prices are always open. Other information usually cannot be kept confidential unless it is a trade secret. Trade secret is defined in Wis. Stat. § 134.90(1)(c), as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique, or process to which all the following apply: 1) The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use; and 2) The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

Failure to include this form in the proposal response may mean that all information provided as part of the proposal response will be open to examination and copying. Other markings of confidential in the proposal document will be considered to be insufficient.

The undersigned agrees to hold CARPC harmless for any damages arising out of the release of any material unless it is specifically identified above or if it is released by an entity other than CARPC. In the event the designation of confidentiality of this information is challenged, the undersigned also agrees to provide legal counsel or other necessary assistance to defend the designation of confidentiality.

Authorized Representative Signature_____

Authorized Representative Name_____

Title_____

Company Name_____

Date_____