



## Request for Proposals

For

County of Dane, Wisconsin

Department of Planning and Development

### **RFP #7529**

Dane County Comprehensive Plan Mail Survey

Proposals must be received  
no later than  
2:00 p.m., June 14, 2004

#### **SPECIAL INSTRUCTIONS:**

1. Place the signed Signature Affidavit as the first page of your proposal.
2. Label the lower left corner of your sealed submittal envelope as follows:  
RFP #7529  
Dane County Comprehensive Plan Mail Survey  
2:00pm, June 14, 2004
3. Mail or Deliver to:  
DANE COUNTY PURCHASING DIVISION  
ROOM 425 CITY-COUNTY BLDG  
210 MARTIN LUTHER KING JR BLVD  
MADISON WI 53703-3345

For further information regarding this proposal,  
contact Carolyn Clow at (608) 266-4966.

Issued by  
Dane County Purchasing Division  
Department of Administration

May 14, 2004

**LATE, FAXED, AND/OR UNSIGNED PROPOSALS WILL BE REJECTED**

## **Dane County Vendor Registration Program**

All bidders wishing to receive a bid/proposal award must be a *paid registered vendor* with Dane County. Prior to the bid opening, you can complete a registration form online by visiting our web site at <http://www.co.dane.wi.us/purch/purch.htm>, or you can obtain a Vendor Registration Form by calling 608.266.4131. Your completed Vendor Registration Form and Registration Fee must be received prior to the bid award.

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## 1.0 GENERAL INFORMATION

### 1.1 Introduction and Background

The purpose of this document is to provide interested parties with information to enable them to prepare and submit a proposal for the design and implementation of a mail survey for the Dane County Comprehensive Plan.

The County as represented by its Department of Planning and Development intends to use the results of this process to award a contract for the sample and survey design, implementation, and analysis of a mailed survey to Dane County residents regarding the comprehensive plan. Completion of at least 500 surveys is required.

Comprehensive planning is defined in Section 66.1001, Wis. Stas., commonly referred to as the Smart Growth legislation. To complete the 3-year planning process, Dane County formed a Comprehensive Planning Steering Committee in the fall of 2002. The Steering Committee relies on working groups in the following three areas: 1) Natural Resources, Agriculture, and Open Space, 2) Housing and Economic Development, and 3) Transportation, Utilities and Community Facilities. The working groups have been meeting regularly throughout the county to develop goals and objectives for the nine elements of a comprehensive plan required by the state:

1. Issues and Opportunities: Compilation of background information, demographic trends, and forecasts, and overall goals and objectives;
2. Agriculture, Natural and Cultural Resources: Recommendations for conserving farmland, natural features, historic/cultural sites, open space and community design;
3. Land Use: Recommendations for the amount, intensity, and location of residential, commercial, industrial and other land uses;
4. Transportation: Recommendations for new or altered roads, transit service, bike and pedestrian facilities, railroads and airports;
5. Utilities and Community Facilities: Recommendations to expand or reconfigure utilities and community facilities;
6. Housing: recommendations to supply sufficient affordable housing for all incomes, ages, and special needs;
7. Economic Development: Recommendations to attract and retain desired businesses and industries and to promote “brownfield” redevelopment;
8. Intergovernmental Cooperation: Recommendations to encourage joint planning and services and to resolve conflicts among plans; and
9. Implementation: Recommended actions to be completed in a stated sequence (timeline) to guide progress toward plan implementation.

Public participation is critical to the planning process. The goal of the survey will be to gather feedback from a random sample of county residents regarding goals and objectives in the nine elements. **MORE HERE**

## 1.2 Preliminary Scope of Services

To gauge public support for the goals and objectives developed by the working groups for each of the 9 planning elements, the effort sought in this RFP will address the following: 1) Survey design, with input from the Comprehensive Planning Steering Committee and the three working groups; 2) Sample design including development of a random sample of Dane County residents to yield at least 500 completions; 3) Fielding of a mail survey, including an advance mailing, survey mailing, and follow-up to non-respondants; 4) Processing the mail surveys and creation of a clean data-set of the survey data; and 5) Basic analysis, including demographic information and frequencies for each survey question.

1. *Survey design, with input from the Comprehensive Planning Steering Committee and the three working groups.* Dane County will provide a rough draft of survey questions for the consultant to refine and format with staff input. The consultant would design the cover letter and the follow-up mailing.
2. *Sample design including development of a random sample of Dane County resident to yield at least 500 completions.* There are approximately 430,000 people in Dane County. The consultant would develop the mailing list of Dane County households. At this time, the Comprehensive Planning Steering Committee is interested in a sample design to capture the interests of Dane County residents. The Committee does not anticipate additional sampling for specific populations of interest.
3. *Fielding of a mail survey, including an advance mailing, survey mailing, and follow-up to non-respondants.* The consultant would prepare and print the mail survey materials, send an advance letter, the survey booklet, a thank you, and a follow-up survey to those in the sample who have not responded.
4. *Processing the mail survey and creation of a clean data-set of the survey data.* The consultant will track survey responses, and code, enter, and clean the data from the survey. One deliverable will be a clean data set in either Access or EXCEL.
5. *Basic analysis, including demographic information and frequencies for each survey question.* The consultant will provide a final data set and guide for reading the data set, and will provide a set of frequency tables and a description of the methodology used.

Services to be provided include periodic status reports to the staff team overseeing the contract, production of a final written report, and a presentation of findings to the Comprehensive Planning Steering Committee.

1.3 Procuring and Contracting Department/Division

This Request for Proposal (RFP) is issued by Dane County, Department of Administration, Purchasing Division, which is the sole point of contact for the County during the selection process. The person responsible for managing the procurement process is Carolyn Clow, Purchasing Agent.

The contract resulting from this RFP will be administered by Dane County, Department of Planning and Development. The contract administrator will be Curt Kodl.

1.4 Definitions

The following definitions are used throughout the RFP.

**County** means Dane County, Department of Human Services, Badger Prairie Health Care Center

**Proposer/vendor** means a firm submitting a proposal in response to this RFP.

**Contractor** means proposer awarded the contract.

1.5 Clarification and/or revisions to the specifications and requirements

**Any questions concerning this RFP must be submitted in writing by mail , fax or e-mail on or before June 2, 2004 at 4:00 p.m. to:**

Carolyn Clow, Purchasing Agent  
Dane County Purchasing Division  
Room 425 City County Building  
210 Martin Luther King Jr. Blvd  
Madison, WI 53703  
VOICE: (608) 266-4966      FAX: (608)266-4425  
E-MAIL: clow@co.dane.wi.us

Vendors are expected to raise any questions, exceptions, or additions they have concerning the RFP document at this point in the RFP process. If a vendor discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the vendor should immediately notify the above named individual of such error and request modification or clarification of the RFP document.

In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this RFP, revisions/amendments and/or supplements will be provided to all recipients of this initial RFP.

Each proposal shall stipulate that it is predicated upon the terms and conditions of this RFP and any supplements or revisions thereof.

1.6 Vendor Conference

There will not be a vendor conference .

1.7 Reasonable Accommodations

The County will provide reasonable accommodations, including the provision of informational material in an alternative format, for qualified individuals with disabilities upon request. If you need accommodations at a proposal opening/vendor conference, contact the Purchasing Division at (608) 266-4131 (voice) or 608/266-4941 (TTY).

1.8 Calendar of Events

Listed below are specific and estimated dates and times of actions related to this Request for Proposal (RFP). The actions with specific dates must be completed as indicated unless otherwise changed by the County. In the event that the County finds it necessary to change any of the specific dates and times in the calendar of events listed below, it will do so by issuing a supplement to this RFP. There may or may not be a formal notification issued for changes in the estimated dates and times.

<b>DATE</b>	<b>EVENT</b>
May 14, 2004	Date of issue of the RFP
June 2, 2004 at 4:00 p.m.	Last day for submitting written inquiries
June 4, 2004	Mail notification to vendors of supplements or revisions to the RFP
June 14, 2004	Proposals due from vendors
Late-June 2004	Oral presentation by invited vendors
Early July 2004	Notification of intent to award sent to vendors
Late July 2004	Contract start date

1.9 Contract Term and Funding

The contract shall be effective on the contract execution date and shall run for one year from that date. Dane County has budgeted \$25,000 for this project. No additional allocations are expected.

2.0 PREPARING AND SUBMITTING A PROPOSAL

2.1 General Instructions

The evaluation and selection of a contractor and the contract will be based on the

information submitted in the vendor's proposal plus references and any required on-site visits or oral presentations. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a response.

Elaborate proposals (e.g. expensive artwork) beyond that sufficient to present a complete and effective proposal, are not necessary or desired.

## 2.2 Proprietary Information

All restrictions on the use of data contained within a proposal and all confidential information must be clearly stated on the attached "Designation of Confidential and Proprietary Information" form. 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 Dane County 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 Dane County. At that time, all proposals will be available for review in accordance with the Wisconsin Open Records Law.

## 2.3 Incurring Costs

Dane County is not liable for any cost incurred by proposers in replying to this RFP.

## 2.4 Submitting the Proposal

**Proposers must submit an original and six (6) copies of all materials required for acceptance of their proposal by March 2, 2004 to:**

DANE COUNTY PURCHASING DIVISION  
ROOM 425 CITY-COUNTY BLDG  
210 MARTIN LUTHER KING JR BLVD  
MADISON WI 53703-3345

Proposals must be received in the above office by the specified time stated above. All proposals must be time-stamped in by the County Purchasing Division by the stated time. Proposals not so stamped will not be accepted.

All proposals must be packaged, sealed and show the following information on the outside of the package:

- Proposer's name and address
- Request for proposal title
- Request for proposal number
- Proposal due date

## 2.5 Proposal Organization and Format

Proposals should be typed and submitted on 8.5 by 11 inch paper bound securely. Proposals should be organized and presented in the order and by the number assigned in the RFP. Proposals must be organized with the following headings and subheadings. Each heading and subheading should be separated by tabs or otherwise clearly marked. The RFP sections which should be submitted or responded to are:

- Introduction (See Section 4 of this RFP)
- Response to general requirements (See Section 4 of this RFP)
  - Organizational qualifications
  - Staff qualifications and Facilities
  - References
- Response to technical requirements (See Section 5 of this RFP)
- Cost proposal (See Section 6 of this RFP)
- Required forms (See Section 8 of this RFP)
  - Attachment A      Signature Affidavit
  - Attachment B      Vendor Data Sheet
  - Attachment C      Reference Data Sheet
  - Attachment D      Designation of Confidential and Proprietary Information
  - Attachment E      Cost Summary Page

## 2.6 Multiple Proposals

Multiple proposals from a vendor will be permissible, however each proposal must conform fully to the requirements for proposal submission. Each such proposal must be separately submitted and labeled as Proposal #1, Proposal #2, etc. on each page included in the response. Alternate acquisition plans do not constitute multiple proposals.

## 2.7 Oral Presentations and Site Visits

Selected vendors may be required to make oral presentations and/or site visits to supplement their proposals, if requested by the County. The County will make every reasonable attempt to schedule each presentation at a time and location that is agreeable to the proposer. Failure of a proposer to conduct a presentation to the County on the date scheduled may result in rejection of the vendor's proposal.

## 3.0 PROPOSAL SELECTION AND AWARD PROCESS

### 3.1 Preliminary Evaluation

The proposals will first be reviewed to determine if requirements in Section 2.0 are met, and if additional mandatory requirements are met. (see Section 4.0). Failure to meet mandatory requirements will result in the proposal being rejected. In the event that all

vendors do not meet one or more of the mandatory requirements, the County reserves the right to continue the evaluation of the proposals and to select the proposal which most closely meets the requirements specified in this RFP.

### 3.2 Proposal Scoring

Accepted proposals will be reviewed by an evaluation committee and scored against the stated criteria. The committee may review references, request oral presentations, and conduct an on-site visit and use the results in scoring the proposals.

### 3.3 Right to Reject Proposals and Negotiate Contract Terms

The County reserves the right to reject any and all proposals and to negotiate the terms of the contract, including the award amount, with the selected proposer prior to entering into a contract. If contract negotiations cannot be concluded successfully with the highest scoring proposer, the County may negotiate a contract with the next highest scoring proposer.

### 3.4 Evaluation Criteria

The proposals will be scored using the following criteria:

	<u>Description</u>	<u>Percent</u>
1.	General requirements	80
	a. Knowledge and expertise of the organization as demonstrated by past survey work, particularly in the area of planning	25
	b. Examples of methodologies proposed to be used to complete this engagement; approach to analysis	25
	c. Evaluation of assigned personnel	10
	d. Timetable for work completion	10
	e. Letters of Reference	10
3.	Cost	<u>20</u>
<b>TOTAL</b>		<b>100</b>

### 3.5 Award and Final Offers

The award will be granted in one of two ways. The award may be granted to the highest scoring responsive and responsible proposer. Alternatively, the highest scoring proposer or proposers may be requested to submit final and best offers. If final and best offers are requested, they will be evaluated against the stated criteria, scored and ranked. The award will then be granted to the highest scoring proposer.