



St. Croix County Administration
1101 Carmichael Road
Hudson, WI 54016

REQUEST FOR PROPOSALS / BIDS
STRATEGIC PLANNING

Proposal Due Date / Time: **March 11, 2020 at 11:00 a.m.**

Submit Proposals to:
St. Croix County Administration
Government Center
1101 Carmichael Road
Hudson, WI 54016



Vendors are invited to submit sealed proposals for **Strategic Planning Request** to the St. Croix County Administration, Government Center, 1101 Carmichael Road, Hudson, Wisconsin 54016, (715) 386-4302, until **11:00 a.m., March 11, 2020**.

St. Croix County reserves the right to accept or reject any or all proposals, in whole or in part, received in response to this request, to waive or permit cure of minor irregularities, and to conduct discussions with all qualified vendors in any manner necessary to serve the best interest of St. Croix County. St. Croix County also reserves the right, in its sole discretion, to award a contract or contracts based upon the proposals received without prior discussion or negotiation with respect to those proposals. Therefore, vendors are cautioned that proposals should be submitted initially on the most favorable terms.

The successful vendor(s) shall be required to enter into a contract agreement with the County. Any agreement or contract resulting from the acceptance of the proposal shall be on forms either supplied by the County or approved by the County. The intent is to commence the service contract in April 2020.

All potential vendors, by submission of their respective proposals, agree to abide by the rules, regulations and procedures of St. Croix County. St. Croix County reserves the right to cancel any order or contract for failure of the successful vendor to comply with the terms, conditions and specifications of the proposal and/or contract.

Specifications may be obtained from Ken Witt, Assistant County Administrator, at 1101 Carmichael Road, Hudson, WI 54016 from 8:00 a.m. to 4:30 p.m., Monday through Friday, except legal holidays or on the St. Croix County website, at: www.sccwi.gov. Questions may be directed to Ken Witt at ken.witt@sccwi.gov, 715-386-4302. No other information provided verbally, or by any other personnel, will be considered binding. All vendors shall use this written document and its attachments as the sole basis for proposals at this time. No phone bids will be accepted.

Vendors must submit two (2) copies of their proposal in a sealed envelope marked "**Strategic Planning Request**". Proposals must be clearly labeled with vendor name, return address, proposal title, date and the name of the vendor's primary contact for proposal questions. All proposals shall be addressed to St. Croix County Administration, Government Center, 1101 Carmichael Road, Hudson, WI 54016. Vendors are required to use the enclosed St. Croix County Proposal Form. Only proposals prepared as requested will be considered. Late responses will not be accepted and will not be considered. Proposals may not be transmitted by fax machine.

St. Croix County is a tax-exempt municipality pursuant to Wisconsin Statute § 77.54(9a)(e).

All proposals submitted will be binding for ninety (90) calendar days following the proposal opening date unless vendor, upon request of the county, agrees to an extension.

Required Documents

Any proposal received without the required documents may result in the proposal being rejected. Vendors must submit the following documents with their proposal:

- Strategic Planning Process Outline
- List of references with Past Strategic Planning clients
- Pricing Proposal

**Vendors may attach additional information to the proposal.

Overview

St. Croix County wishes to contract for support of a Strategic Planning Process. Our elected Board of Supervisors will have over a 50% turnover in April due to many retirements from the Board. While the County does have a Vision, Mission Statement, Priority Areas and Guiding Principles, our strategic issues and goals have now reached the end of their planned life. The timing of the new Board of Supervisors and need for an update has prompted the request for a review and update with a full Strategic Planning Process.

Scope of Project

Vendor will lead Strategic Planning meetings and prepare Strategic Planning Report. Vendor will propose their own planning process. Vendor should estimate the number and length of meetings necessary to complete the process. St. Croix County would like to start the planning process in May 2020 and complete plan by September 2020. St. Croix County will provide the meeting room space at 1101 Carmichael Road in Hudson. St. Croix County will provide digital technology requirements currently available in the meeting room space. St. Croix County will schedule all participants. Meetings may be at 8am or at 5pm, depending on the preference of the St. Croix County Board of Supervisors. Example of the planning process, so Vendor can gauge their planning process against County expectations:

- A. Educational Session for New County Board Members
 1. Two Hour Session planned for May 2020; and
 2. Will be County Staff conducted reviewing services delivered in the County; and
 3. Normally considered the start of our planning process.

- B. Review of Vision, Mission Statement, Priority Areas, Guiding Principles
 - 1. If current overarching principles are acceptable then continue on with the process;
 - 2. If changes are requested, conduct exercise to update as required; and
 - 3. Use this meeting as a chance for solicited public input from citizens.
- C. Strengths, Weaknesses, Opportunity and Threats (SWOT) Analysis with Department Heads and County Board Supervisors
- D. Strategic Planning Sessions – Number and Frequency as Needed
 - 1. Identify Objectives (ie sticky wall brain storming);
 - 2. Identify Strategies;
 - 3. Identify Outcome Measurements;
 - 4. Strategic Issues Decision Matrix; and
 - 5. Prepare Final Strategic Plan.
- E. Steps After Strategic Plan is Developed – Post Vendor Support
 - 1. Departments use plan to create action steps; and
 - 2. Reporting on process outcomes.

Vendor Requirements

Vendor shall have prior Strategic Planning experience with a list of references. Prior government experience preferred.

Schedule

Vendor will identify proposed schedule. County expectations are May 2020 – September 2020.

Assignment and Subcontracting

Vendor may not subcontract without prior written approval from the County.

Contract Term

St. Croix County will issue a Purchase Order for the price of the planning process and will make payments as outlined in the Pricing Proposal.

Pricing

Vendor should provide a Pricing Proposal. Vendor can either use a flat price for the process, or a variable price based on number of meetings or hours. Price should be calculated based on proposed process so estimated total costs can be compared to other proposals. Any billable costs, such as mileage or copies should be estimated in total proposal costs.

Vendor payment terms should be expressly spelled out, such as monthly billing net thirty (30) or percentage based on steps completed in the process.

Important Dates

Bids Due March 11, 2020 by 11:00 a.m.

Start of Strategic Planning Process – May 2020

Anticipated Completion of Process – September 2020

Proposal Withdrawal

Proposals may be withdrawn prior to bid opening. Once opened, all proposals are binding for ninety (90) days from date of bid opening.

Vendor Supplied Documentation

St. Croix County agrees not to use any supporting documents provided in the proposal that are specifically marked as proprietary documents, without prior Vendor approval. Vendor acknowledges that as a governmental unit, St. Croix County is required to release proposals to any open record requestor and cannot guarantee confidentiality of any documents submitted.

Evaluation Criteria

Evaluation criteria will be weighted most important in the following order:

1. Strategic Planning Process Suggested. While St. Croix County has a level of expectation, we defer to the experts to provide a process that will provide the best results. The process outlined that we feel best meets our needs will be the main evaluation criteria.
2. Prior experience. Provide a list of prior Strategic Planning experience. Preference will be given for prior government clients.
3. Price. While we are most interested in the final product, we do have a limit to what can be afforded. We will not be selecting the lowest bid, unless they are also the net highest rated for evaluation criteria 1 and 2.