

OFFICIAL NOTICE # 57673

**REQUEST FOR PROPOSALS
PREPARATION OF MARKET ANALYSIS FOR THE NEAR WEST SIDE**

The Department of City Development (DCD) of the City of Milwaukee, is requesting proposals from qualified firms/individuals (the "Consultant") to prepare a Market Analysis for the Near West Side.

The RFP can be found on DCD's web site at the following link:

<http://city.milwaukee.gov/DCD/RFPs>

Questions regarding this RFP should be addressed to Scott Stange in writing via email at: sstang@milwaukee.gov. Deadline for questions regarding the RFP are due by, **May 27, 2016**. Any additional information and/or clarification(s) regarding this RFP will be posted on the above referenced website in the form of an addendum to this RFP by **May 31, 2016**.

Proposals are due June 7, 2016 by 11:00 a.m.

May 16, 2016

Cover Sheet and Table of Contents..... Page 1
RFP Document Pages 2-6
General RACM RFP Requirements Pages 7-9
Scope of Service Requirements Pages 10-17
Technical Requirements for Plans Prepared by Consultants Pages 18
Attachments
A. SBE Information Form A (**must be completed and attached to your proposal**)
B. Affidavit of No Interest (**must be completed and attached to your proposal**)
C. Designation of Confidential and Proprietary Information Form
D. Local Business Enterprise forms

**REDEVELOPMENT AUTHORITY
OF THE CITY OF MILWAUKEE
809 N. Broadway
Milwaukee, Wisconsin 53202**

I. Background

Since the Near West Side Area Plan was first prepared in 2004, before the recession, market conditions have changed dramatically. The Near West Side has seen many successes with the redevelopment of key sites, yet some of the challenges facing residential and commercial areas originally identified in the Near West Side Area Plan remain.

There is a need to identify the challenges and opportunities facing this area in order to create a strategy for targeted investment and redevelopment. The analysis will identify the supply and demand for housing and retail options in the area. The analysis will also identify sites where investments will be most likely to succeed.

Major institutions and strong neighborhoods anchor the area. The City, along with its community partners, is ready to create a comprehensive market analysis for the Near West Side. The purpose of the Near West Side Market Analysis is to evaluate the existing assets and identify opportunities in the area to guide future development and investment. The plan will be prepared with extensive public involvement and will be guided by the City in conjunction with its community partners.

II. Market Analysis Objectives

The analysis will be incorporated as an update into the Near West Side Area Plan. The plan will provide a coordinated framework for public and private investment decisions and practical implementation strategies.

- The plan will utilize the existing planning knowledge base by integrating the analysis and recommendations of studies and planning efforts recently conducted/being conducted for the project area.
- The plan will identify area needs, highlight development opportunities, and establish priorities for investment.
- The plan will identify key sites to guide and focus successful investment.
- The plan will provide guidance for evaluating residential and commercial investment and adding long-term value.
- The plan will provide a basis for leveraging and directing long-term investments.

III. Scope of Services

SEE ATTACHED

IV. Project Requirements

A. Schedule – A fixed price contract will be executed with the chosen Consultant following the completion of the evaluation of the responses. The target date for contract completion is five to seven months from project initiation/contract execution. This does not preclude the negotiation of additional or reduced services and contract amounts prior to the initiation of work. If this timeline is judged to be unreasonable, the Consultant should suggest a different completion date and explain the rationale.

B. Coordination - Staff from the DCD's Planning division will coordinate the assignment of this project. For the purpose of efficiency, DCD requires that the chosen Consultant be accessible to RACM/DCD staff on a regular and as needed basis. The Consultant and RACM/DCD will establish

a regular communication format through which RACM/DCD can be kept current as to the plan's progress.

C. Products - The Consultant shall provide deliverables and attend meetings as noted under the Scope of Services. All results (including work in progress) from this contract will remain the property of DCD (City of Milwaukee). DCD will have access to all other working papers or information stored on a computer or computer disk of the Consultant concerning this contract; the Consultant should check with DCD prior to destroying any working papers or information stored on a computer or computer disk. The Consultant may release no information about this proposed project without DCD's prior authorization.

D. Insurance - Before commencing work the Consultant shall furnish RACM, for review and approval, evidence of the following insurance coverage:

<u>Coverage</u>	<u>Amounts</u>
Workers' Compensation	Statutory Limit
Comprehensive General Liability	BI (Bodily Injury) \$500,000 per occurrence \$1,000,000 aggregate PD (Property Damage) \$500,000 per occurrence
Automobile Liability	BI \$500,000 per person \$1,000,000 per occurrence PD \$500,000 per occurrence
Professional Liability	\$1,000,000.00

The Consultant shall provide DCD with Certificates of Insurance evidencing the above referenced coverage. The insurance carrier must be licensed to do business in the State of Wisconsin. The City of Milwaukee shall be named as an additional insured with respect to liability coverage, except for the Professional Liability. Failure to provide the insurance required shall permit the City to terminate a Contract. The City, as an additional insured, shall be provided with at least 30 days written notice of cancellation, non-renewal or material limitation of coverage of any and all insurance policies required by this contract/ for any reason, including non-payment of premium. This should be accomplished through the addition of an endorsement to the policies providing Earlier Notice of Cancellation or Non-Renewal. Such endorsement must contain the following stipulation:

[Insurance Company] will mail notice of cancellation (including for non-payment of premium), non-renewal or material limitation of coverage to the organization shown in the schedule above. [Insurance Company] will mail the notice at least 30 days before the effective date of our action.

The contractor shall not permit the coverage to lapse and shall furnish evidence of coverage to DCD.

The certificate holder shall be noted as: Department of City Development
809 N. Broadway, 3rd floor
Attn: Scott Stange, Purchasing/Contract Services
Milwaukee, WI 53202

V. Proposal Submission Requirements and Selection Procedures

A. Proposal Contents - Consultants responding to this RFP must provide the following information in their proposals. Brevity is encouraged. None of the following should exceed one page in length.

1. Title Page

The title page should include - Request for Proposal #**57673, Market Analysis for the Near West Side**, and the name of the firm, address, telephone number, name of contact person, e-mail address, FAX number, and date.

2. Letter of Transmittal

The letter of transmittal should concisely describe the Consultant's understanding of the work to be performed. The names of those authorized to make representations on behalf of the Consultant, their titles, addresses, and phone numbers must be included

3. Time and Cost

The Consultant should provide a time and cost estimate for each project task from this RFP's Scope of Services. The Consultant must provide an all-inclusive cost schedule, including fees and reimbursables (e.g. travel). The successful Consultant shall be expected to honor the cost schedule identified in their proposal for the duration of the contract, unless modified by mutual agreement in writing.

4. Documentation of Past Experience and Qualifications

Explain the Consultant team's planning process, and how it will develop innovative, diverse and practical recommendations.

Provide information about the Consultant's experience in working on similar projects. Information should include project summaries, descriptions of the firm/individual's involvement in the projects, references for these projects, the dates the work was performed, whether the office proposed for this contract was the servicing office, and whether key persons assigned to these projects are still with the firm and available to work on this project.

Provide a sample of work demonstrating the writing and editing ability of key consultant staff assigned to the project. This sample should be included with the submission and preferably provided on a CD (though paper versions will still be accepted).

5. Staffing RFP

The Consultant must identify the specific people/person who would manage this project and a description of their experience and qualifications. Identify the person who would manage the project.

Key Consultant staff to be assigned to the plan must be identified, along with a description of the tasks and approximate number of hours of involvement of each staff person in the project.

If the Consultant proposes to use subcontractors for this project, subcontractors must be identified. Provide the following information about proposed subcontractors: Company name, name of contact, title of contact, telephone number. All subcontractors must be approved by the City of Milwaukee.

6. Small Business Enterprise (SBE) Participation

The goal for this contract is a total combined Small Business Enterprise (SBE) participation rate of 18% of the total dollars expended on this Contract. SBE's must be currently certified by the City of Milwaukee. For a listing of SBE firms certified by the City of Milwaukee, go to the following link, click on the "SBE Business Directory" and then click on "Search for Certified Firms": <http://city.milwaukee.gov/osbd>

Proposers must complete and submit with their proposal Form A, as referenced in the Table of Contents (Attachment A).

7. Local Business Enterprise

RFPs that are issued on or after August 10, 2009 include a Local Business Enterprise (LBE) incentive in accordance with Section 365 of the Milwaukee Code of Ordinances. The notarized Local Business Enterprise Program Affidavit of Compliance must be submitted with your proposal to be considered for LBE status. It is the Proposer's responsibility to familiarize yourself with this ordinance prior to submitting your RFP. Information regarding LBE can be found in the attached forms and at the following link:

<http://city.milwaukee.gov/Purchasing/PPR/LBE.htm#.VzY-jE3rupo>

B. Selection of Consultant -After screening proposals for completeness and project cost; the RACM/DCD Staff along with its community partners will evaluate proposals and assign points to each proposal based on the following criteria:

- Consultant's understanding, experience and success in preparing market analyses (a maximum of 25 points);
- Quality of the description of the proposed products and methods (a maximum of 25 points);
- Consultant's understanding of and experience working in the Milwaukee market or similar markets (a maximum of 20 points)
- Ability to meet with DCD on a regular and as needed basis (a maximum of 15 points);
- Quality of the writing in sample work included with the proposal (a maximum of 10 points);
- SBE Business participation (a maximum of an additional 10 points)
- All-inclusive project cost (a maximum of 10 points)

If a Local Business Enterprise (LBE) is a responsive and responsible Proposer, an additional number of points equal to 5% of the maximum number of points used in the evaluation of the RFP shall be applied to the total score attained by the LBE.

C. Submission Deadline - All questions and communication regarding this RFP process and scope of services should be submitted in writing (See #1 of General RFP Requirements) to Scott Stange. Questions must be sent in writing **no later than May 27, 2016**. Questions initiated after **May 27, 2016** will not be considered. Any additional information, clarification and answers to the questions submitted by the deadline date will be posted on the Internet on the website referred to below in the form of an addendum to this RFP by **May 31, 2016**:

<http://city.milwaukee.gov/DCD/RFPs>

Proponents will be responsible for keeping abreast of the addenda as they are posted. All such addenda shall become a part of the RFP, and all Proponents shall be bound by such, whether or not received by the Proponent

One (1) original, five (5) copies, and one (1) .pdf copy (on a CD or Flash Drive) of the proposal should be submitted to DCD's Bid Desk no later than **11:00 a.m., June 7, 2016**. The proposals must be submitted **along with the required, SBE Form A and the Affidavit of No Interest.** Late submissions will not be accepted.

Proposals should be mailed or delivered to:

Bid Desk
Department of City Development
809 N. Broadway, 2nd floor
Milwaukee, WI 53202-3617

Proposal to be clearly marked: **Official Notice #57673 – Market Analysis for the Near West Side**

***** Please note:** For proposals submitted by courier delivery service (e.g. UPS®, FedEx®, etc.), the building at the address above **does not open until 8:00 a.m.** Instructions to delivery drivers should be explicit in regard to that **time** as well as the above noted address of the bid desk. Without such instructions, a package may not be delivered on-time to the correct location within the City complex.

VI. General RACM RFP Requirements

1. Interpretations of RFP

Any requests for interpretation should be submitted in writing to Scott Stange, Contract Compliance Officer, Department of City Development of the City of Milwaukee, 809 North Broadway, MILWAUKEE, WI 53202, or submitted by email to sstang@milwaukee.gov. No oral interpretations will be made to any Consultant as to the meaning of the RFP requirements. All interpretations will be posted and answered on the Internet. If you received your RFP from the Internet you will be responsible for keeping abreast of the addenda as they come in. All such addenda shall become a part of the RFP, and all Consultants shall be bound by such, whether or not received by the Consultant.

2. Receipt of Proposals

Proposals received prior to the time of opening will be secure. The officer whose duty it is to open them will decide when the specified time has arrived, and no proposal received thereafter will be considered. No responsibility will be attached to an officer for the premature opening of a proposal not properly addressed and identified.

Consultants are cautioned to allow ample time for transmittal of proposals by mail or otherwise. Consultants should secure correct information relative to the probable time of arrival and distribution of mail at the place where proposals are to be forwarded.

3. Withdrawal of Proposals

Proposals may be withdrawn on written request dispatched by the Consultant in time for delivery in the normal course of business prior to the time fixed for closing. Negligence on the part of the Consultant in preparing a proposal for offer to DCD confers no right of withdrawal or modification of the proposal after such proposal has been opened. In case of withdrawal of a proposal by a Consultant, the Consultant will be disqualified thereby from submitting a second proposal on the contract at hand. See Section 66.0901(5), Wisconsin Statutes.

4. Rejection of Proposals

DCD reserves the right to reject the proposal of any Consultant who has previously failed to perform properly or to complete on time contracts of a similar nature, who is not in a position to perform the contract, or who has habitually and without just cause neglected the payment of bills or otherwise disregarded his obligations to subcontractors or employees.

5. Award of Contract

The Contract Management Team will evaluate proposals. All proposals will be evaluated against the evaluation factors stated in this RFP. While the Contract Management Team intends to select a Consultant based on the proposals received, the Contract Management Team may invite the highest ranked firm/individual(s) to participate in an interview. If one or more interviews are to be scheduled, a letter will be sent to the firm/individual(s) that is/are selected to participate, and this/these firm/individual(s) may be asked to provide more specific written information about their qualifications, methodology, and costs. Firms/individuals participating in the interviews must send the project manager and staff who will work on this project.

After the contract is awarded, all of the firms who submitted a proposal will receive a written acknowledgment of their proposals. DCD will not reimburse firms for any expenses associated with the submission of proposals or participation in the interviews.

6. Contract Payments

DCD and the Consultant will agree on a performance and payment schedule. The Consultant will submit to DCD invoices itemizing the services performed and cost incurred since the last request for payment. Payment will be made after review of the Consultant's work product and upon acceptance by DCD of the services performed.

7. Termination of Contract for Cause

If, through any cause, the Consultant shall fail to fulfill in a timely and proper manner his obligations under this contract or if the Consultant shall violate any of the covenants, agreements or stipulations of this contract, DCD shall thereupon have the right to terminate this contract by giving written notice to the Consultant of such termination and specifying the effective date thereof, at least five work days before the effective date of such termination. In such event, all finished or unfinished documents, data, studies, surveys, reports, or other material related to the services prepared by the Consultant under this contract shall, at the option of DCD, become the property of DCD. Notwithstanding the above, the Consultant shall not be relieved of liability to DCD for damages sustained by DCD by virtue of any breach of the contract by the Consultant.

8. Sales Tax

Pursuant to Section 77.54(9a) of the Wisconsin State Statutes, RACM is exempt from Wisconsin Use and Sales Tax. Consultants, therefore, shall not add State of Wisconsin sales tax or use tax to their proposals, but shall include in their lump sum proposals only the taxes they will be required to pay directly as a consumer, when obtaining materials, etc. to fulfill the contract requirements should they be the selected Consultant. Consultants are, however, responsible for determining the impact of the State of Wisconsin's Sale and Use Tax on their proposal.

9. Request for Proposal

This RFP is not an offer to buy and must not be assumed as such. However, in the event a proposal results in contractual negotiations, the Consultant has the option to not convey and/or sell if compliance with any mandated clause or provision is undesirable or impossible.

No information will be available to any Consultant regarding the status of his response. However, DCD reserves the right to enter into discussion with Consultants for purposes of clarification or further information.

10. Miscellaneous

DCD (City of Milwaukee) reserves the right to waive informalities in any proposals, reject any or all proposals in whole or in part, with or without cause, and to accept that proposal which in its judgment best meets its needs. DCD (City) will require an Affidavit of No Interest, which provides that no official or employee of the Redevelopment Authority, the Contract Management Team, and/or DCD (City of Milwaukee) has or will receive anything of value in connection with the issuance of this contract.

11. Equal Employment Opportunity

The Consultant agrees that there will not be discrimination as to race, sex, sexual orientation, religion, color, age, creed, or national origin in regard to obligation, work, and services performed under the terms of any contract ensuing from this RFP. Consultant must agree to comply with Executive Order No. 11246, entitled "Equal Employment Opportunity" and as amended by Executive Order No. 11375, as supplemented by the Department of Labor Regulations (41 CFR, Part 60).

12. Indemnification

The Consultant agrees that it will indemnify, save and hold harmless DCD and the City of Milwaukee, their officers, employees, or agents, from and against all claims, demands, actions, damages, loss, costs, liabilities, expenses, judgments, and litigation costs, including reasonable attorneys fees, photocopying expenses and expert witness fees, recovered from or asserted against DCD or the City of Milwaukee on account of injury or damage to person or property or breach of contract to the extent that such damage, injury, or breach may be incident to, arising out of, or be caused, either directly or proximately, wholly or in part, by an act or omission, negligence or misconduct on the part of the Consultant or any of its agents, servants, employees or subcontractors.

RACM shall tender the defense of any claim or action at law or in equity, arising out of or otherwise related to an act or omission, negligence, misconduct, or breach of contract on the part of the Consultant or any of its agents, servants, employees or subcontractors, to the Consultant or its insurer and, upon such tender, it shall be the duty of the Consultant and its insurer to defend such claim or action without cost or expense to RACM.

13. Slavery Disclosure

The successful Consultant will be required to submit an affidavit of compliance of slavery disclosure before a purchase order/contract can be executed (unless you have already done so and it is on file with the Business Operations Division of the City of Milwaukee).

14. Ethics

It is the policy of the Department of City Development, Redevelopment Authority (DCD-RACM), that contracts shall not be awarded to any consultant team that includes individuals who have left City employment within the past 12 months, or individuals who are currently members of any City boards or commissions.

15. Wisconsin Public Records Law

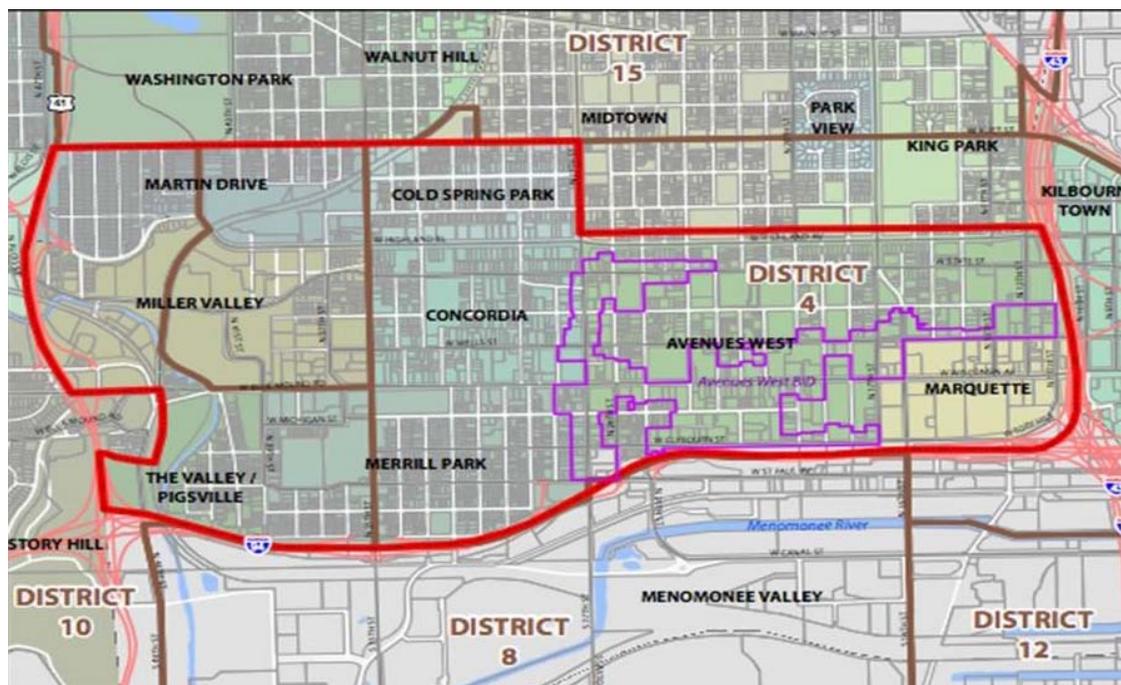
Both parties understand that the Redevelopment Authority of the City of Milwaukee is bound by the Wisconsin Public Records Law, and as such, all of the terms of this Agreement are subject to and conditioned on the provisions of Wis. Stat. 19.21, *et seq.* The Contractor acknowledges that it is obligated to assist the Redevelopment Authority in retaining and producing records that are subject to Wisconsin Public Records Law, and that the failure to do so shall constitute a material breach of this Agreement, and that the Contractor must defend and hold the Redevelopment Authority harmless from liability under that law. Except as otherwise authorized, those records shall be maintained for a period of seven years after receipt of final payment under this Agreement.

SCOPE OF SERVICES and WORK PLAN FOR THE NEAR WEST SIDE MARKET ANALYSIS

Please note: The Consultant is not responsible for all tasks. Some of the tasks listed below are initiated and completed entirely by DCD staff or DCD staff in combination with the Near West Side Partners (NWSP). These are noted where applicable.

The City of Milwaukee is currently working with the Near West Side Partners (NWSP), a new non-profit organization funded through the support of five anchor institutions, Aurora Health Care, Harley-Davidson, Marquette University, MillerCoors and Potawatomi Business Development Corporation to revitalize and sustain the Near West Side as a thriving business and residential corridor. NWSP coordinates and implements collaborative efforts to promote economic development, improved housing, unified neighborhood identity and branding, and greater safety for residents and businesses.

The Near West Side (NWS) is bordered by Highland Avenue and Vliet Street to the north, I-43 to the east, I-94 to the south, and WIS 175 to the west (see map below). Recently, the NWSP announced a \$5 million fundraising effort to support revitalization efforts in the neighborhood. The objective of the Near West Side Market Analysis is to identify the types of residential and retail investments that will be economically feasible on the Near West Side and support the ongoing revitalization of this area. DCD will help facilitate coordination between the market analysis Consultant and the various stakeholders leading the efforts of the NWSP.



Key services for the market analysis will require the Consultant to carry out the following general activities:

- Review current land uses on the NWS.
- Review current demographics and project future demographic trends.
- Review residential market data, including analyzing supply and demand of rental and for-sale housing units, calculating vacancy rates, reviewing the quality existing housing options and analyzing the demand for new housing options in the NWS. This will include identifying the areas of the NWS where a demand for new or substantially rehabilitated housing may exist, and recommending the specific housing types that should be created to meet this demand.
- Carrying out a commercial market study analyzing the supply and demand for commercial/retail space in the NWS, including calculating vacancy rates, completing a trade area analysis, and analyzing the demand for new retail options in the NWS. This will include identifying the commercial corridors on the NWS where new retail options may be the most successful, and specifically analyzing the feasibility of attracting a grocery store to the study area.
- Conduct a series of stakeholder interviews and/or focus groups with area developers, brokers, business owners and other key informants.
- Identify priority nodes for commercial development and areas for new housing, based on the Near West Side Partners (NWSP) Strategic Plan, the UW-Milwaukee Community Design Solutions (CDS) Design Charette Report, and the City of Milwaukee Multifamily Strategy.
- Consider the major anchor institutions (Aurora, Marquette University, Potawatomi, Harley-Davidson and MillerCoors) and the potential for economic development tied to their presence and investment on the NWS.

The market analysis shall consider and be informed by the following prior plans and studies to be provided the Consultant by DCD:

- City of Milwaukee Near West Side (NWS) Comprehensive Area Plan & Market Analysis
- Near West Side Partners (NWSP) Strategic Plan
- City of Milwaukee NWS Opportunities Agenda
- City of Milwaukee NWS Multifamily Strategy
- UW-Milwaukee CDS NWS Design Charrette Report
- West Side Employee Survey

A more detailed scope of work that the selected Consultant will be required to complete is below.

Task 1: Plan Initiation

1.1 Contract Negotiation. Redevelopment Authority of the City of Milwaukee (RACM)/Department of City Development (DCD) will conduct contract negotiations finalizing scope/budget/schedule with the Consultant, through e-mail and regular mail.

1.2 Contract Finalization. DCD and Consultant will sign the contract with the scope/budget/schedule attached. DCD will submit to Consultant a signed final copy of the contract.

1.3 Project Initiation Meeting. Consultant will conduct one (1) project initiation meeting with DCD staff and Near West Side Partner's leadership to review the overall work plan, coordination with ongoing Near West Side Partners efforts, desired outcomes and expectations, project budget, and timetable.

- a) Project initiation meeting will be coordinated by DCD. Consultant will attend the Project Initiation Meeting.
- b) Consultant will verify proposed contents of final Market Analysis Report with DCD, NWSP and others.
- c) Consultant will verify stakeholder involvement approach and details of the meetings with DCD.
- d) Consultant will provide notes to DCD for preparation of minutes of the meeting.

Task 2: Information Gathering and Analysis

2.1 Walking Tour. Consultant team will participate in one guided walking tour with DCD/NWSP and other stakeholders. Logistics will be arranged by DCD and NWSP.

- a) Consultant will coordinate itinerary with DCD.
- b) Consultant will provide notes to DCD for preparation of meeting minutes.

2.2 Reconnaissance. Consultant will review past planning efforts listed below and provide written summary of relevant information to be included in draft report.

- City of Milwaukee Near West Side (NWS) Comprehensive Area Plan & Market Analysis
- Near West Side Partners (NWSP) Strategic Plan
- City of Milwaukee NWS Opportunities Agenda
- City of Milwaukee NWS Multifamily Strategy
- UW-Milwaukee CDS NWS Design Charrette Report
- Near West Side Employee Survey

2.3 Review Land Use. Consultant will review current land use trends and conditions, analyze supply and demand, review the quality and quantity of existing commercial and residential land uses within the NWS, along with industrial, institutional, non-profit, and office uses within the study area and identify the advantages and challenges for new development and re-development.

- a) DCD will work with Consultant to secure updated City of Milwaukee parcel level data. DCD will provide pertinent real estate data as available from the NWS, adjacent planning areas and select commercial corridors in the City of Milwaukee. This may include publicly available MPROP data and other selected city-acquired data requested by

Consultant, if available. Such data may include building, occupancy and business licensing data, requests for zoning changes and other services, building code violations, construction and renovation permits, ownership changes, and other data such as first responder calls (fires) if available. The data should be provided in GIS-compatible formats where applicable.

- b) Consultant will analyze the data to identify land use and development trends in the NWS and adjacent planning areas (as relevant to the NWS), focusing on area requirements, amenities and services, and relationship to anchor institutions and current and proposed transportation facilities.
- c) Consultant will document the results of the analysis in the draft report.

2.4 Focus Groups. Consultant will conduct two focus groups of developers, brokers, and lenders to discuss real estate and development potential and impediments, business needs, strengths and weaknesses of the area, and development trends within the area. DCD and NWSP will be responsible for all meeting logistics and content. Consultant will review and provide input on interview questions provided by DCD, via email, or phone conference, prior to pertinent meetings. These focus groups will be coordinated with DCD.

- a) Consultant will provide DCD with questions for the focus groups and follow up questions. The Consultant will refine and revise the questions in consultation with DCD and NWSP. The questions will address the specific strengths, weaknesses, opportunities and threats for development in the NWS and be used to verify development, land use and workforce trends identified in task 2.3. Discussion topics will include market potential for new development and substantial redevelopment within the various neighborhoods and commercial corridors of the NWS.
- b) DCD, in coordination with Consultant, will identify invitees for the focus groups. Invitees may include representatives from neighboring anchor institutions, such as Aurora, Marquette University, Potawatomi, Harley-Davidson, and MillerCoors; local developers and property owners, neighborhood leaders, real estate brokers, small business owners, etc.; and others as identified in collaboration with DCD.
- c) DCD and the lead consultant will organize the focus groups, secure a location, invite attendees provide necessary presentations, exhibits and logistical items to host and facilitate the focus group. Consultant will attend the focus group and aid in facilitation as necessary.
- d) Consultant will provide notes to DCD for preparation of minutes of the meetings.
- e) Consultant will summarize and document the results of the focus groups in the draft report.

2.5 Stakeholder Interviews. Consultant will participate in up to 12 (twelve) stakeholder interview sessions. DCD and NWSP will be responsible for all meeting logistics. These interviews will be conducted by the Consultant.

- a) In collaboration with DCD, Consultant will recommend candidates for interview. DCD will assist the consultant to arrange interviews at times and locations to be determined at the Project Initiation Meeting.
- b) Consultant will provide DCD with stakeholder interview questions and follow up questions. The Consultant will refine and revise the questions in consultation with DCD and the NWSP. The questions will address the specific strengths, weaknesses, opportunities and threats for development in the NWS and be used to verify development and land use trends identified in task 2.3.
- c) Consultant will conduct confidential interviews.
- d) Consultant will summarize interview results and document them in the draft report.
- e) Upon mutual agreement between DCD and Consultant, additional focus groups may be substituted for stakeholder interviews at a ratio one focus group to three stakeholder interviews.

2.6 Residential Market Analysis. Review residential market data, including analyzing supply and demand of rental and for-sale housing units, calculating vacancy rates, reviewing the quality of existing housing options and analyzing the demand for new housing options in the NWS. This will include identifying the areas of the study area where a demand for new or substantially rehabilitated housing may exist, and recommending the specific housing types that should be created to meet this demand.

- a) Consultant will catalog the supply of both rental and for-sale housing in the NWS. This includes a review of the area rental market to determine unit mix (bedrooms, quality of building, etc.), vacancy rates, availability/inclusion of parking, number of rent/income restricted units, and data on monthly rental rates, leasing incentives, and historic (rental rate trends). Consultant shall include basic demographic information on area renters in this inventory. For single-family and duplex for-sale housing, this includes analyzing sale prices of both distressed and fully restored homes in the various neighborhoods within the study area, as well as an analysis of the sale of newly constructed homes in a larger radius given the limited new construction in the study area.
- b) Consultant will provide an analysis of the demand for new housing in the various neighborhoods within the NWS. This includes recommending whether significant renovations (including conversions to larger units) at existing apartment buildings may have the potential to generate higher rents, what types of improvements would be required, and potential impacts on rental rates. It will also identify locations and housing styles where there may be a demand for new, market rate, multi-family or single-family housing.
- c) If Consultant concludes that selective acquisition/demolition of obsolete/blighted residential properties may be required to generate new investment in the NWS, Consultant will identify the particular areas where this type of activity may have the greatest impact on attracting new investment in the area housing market. Consultant shall also analyze the potential of selective demolition to reduce negative influences

caused by blighted properties in the area and increase neighboring property values even in the absence of new development in the short-term.

- d) Consultant will recommend priority areas for residential development where the City and NWSP should prioritize new housing development that has the greatest potential to spur additional private investment in the area.
- e) Consultant will analyze the market potential for new construction of single family homes for sale on the NWS. This includes projecting potential demand, feasible locations within the larger NWS, and likely sale prices for new construction homes in the area.
- f) Consultant will analyze the impacts of potential increased demand from employees of NWS anchor institutions and other area employers for rental or for sale housing in the area and the types of housing options required to generate that demand.
- g) Consultant will document the results of analysis in draft report.

2.7 Commercial Market Analysis. Review the market analysis section of the Near West Side Area plan, as well as more recent planning efforts. Past planning efforts identified 27th Street, 35th Street, Vliet Street, and Wisconsin Avenue as the primary commercial corridors in the NWS. Analyze supply and demand for new retail opportunities in the NWS and suggest potential sites. Of particular interest to stakeholders is the market potential for a full-service grocery store.

- a. Consultant will work with DCD to verify NWS commercial corridor boundaries for analysis and will identify the overall NWS trade area and its relationship to surrounding commercial areas.
- b. Consultant will provide a summary of existing commercial space, including vacancies. Information to be included: types of commercial uses present (including non-profit/social service users), approximate lease rate, area, age of building.
- c. Consultant will complete retail gap analysis to determine whether there is an over or under supply of specific retail options in the planning area.
- d. Consultant will analyze current and future retail demands in the area and space requirements by retail category.
- e. Consultant will identify which NWS commercial corridors may be best positioned to attract those categories of new businesses for which there is demand in the NWS and where investment in attracting retail/commercial users should be prioritized.
- f. Consultant will analyze market potential for a grocery store in the planning area and identify potential locations. This will include identifying what size/format of grocery store may be feasible at the identified locations within the NWS.
- g. Consultant will identify impediments to commercial development in the NWS.
- h. Consultant will document results of analysis in draft report.

2.8 Land Use Change Analysis. Review of sites susceptible to change, including vacant and underutilized properties to identify opportunity sites and corridors with the highest potential for redevelopment. Consultant will identify market opportunities within the plan area and determine where and what types of investment and development will most likely be long-term economically successful.

- a) Using data gathered in tasks 2.2-2.7, Consultant will identify key opportunity sites in the NWS planning area. Consultant will identify recommendations for investment to maximize redevelopment potential. This task will include specifically addressing the market feasibility for the site-specific development proposals contained within the NWS Design Charrette Report.
- b) In coordination with DCD and the lead consultant, Consultant will make policy recommendations to preserve desirable mix of uses in the NWS planning area.

2.9. Public Meeting. Consultant will participate in two public meetings to present results of the market study. (This may include a presentation to the NWSP or CPC.)

Task 3: Report

3.1 Draft and Final Report. The Consultant will prepare a Draft written report, with tables, graphs, maps, and photographs to illustrate and help communicate the details of the market analysis. This Draft will be reviewed by DCD and NWSP. Consultant will incorporate any changes from this review into a Final report. The plan document will include an executive summary.

- a) Consultant will provide report to DCD in either Microsoft Word or InDesign format.
- b) The draft and final reports will include the content specified in this Scope of Services, or as revised by DCD in consultation with Consultant.
- c) The Final Market Study document may be adopted as an update to the Near West Side Area Plan
- d) It is anticipated that the draft report will be submitted within four months of notice to proceed. If delays arise, Consultant will coordinate with DCD to submit the draft report in as timely a fashion as possible. The final report will be submitted within one month of receipt of all comments and revision of the draft document.

Task 4: Project Management and Quality Assurance

4.1 Project Management. The Consultant will manage the project in accordance with standard Consultant practices, providing regular invoicing, along with budget and schedule reviews.

4.2 Progress and Coordination Meetings. The Consultant will attend up to three progress meetings during the course of the project, to coordinate with DCD. One meeting is recommended to be used to prepare for the focus groups detailed in task 2.4, one meeting to present preliminary findings to DCD in advance of submission of the draft report, and one to review comments on the draft report.

4.3 Quality Management. Prior to submission of the draft report, the Consultant will provide an internal technical review of the draft report by a Consultant staff member not associated with the project with expertise in economic and market evaluation. The reviewer's comments will be resolved in accordance with Consultant's quality management system and the draft report will be revised accordingly.

SUPPLEMENTAL TASKS:

Note: The items below are not part of the base scope of work for this RFP. They may be added to the final scope of work at a later date depending on DCD/NWSP preference and budget availability. In responding to this RFP, the cost for completing the tasks below should not be included in the base bid amount, but should be listed separately as a supplemental item.

2.6(b) Renter and Homeowner Resident Surveys. Design and implement a Near West Side resident survey. This survey would gather input from existing residents on topics such as why they elected to live on the NWS, whether they plan to move, whether they plan to make carry out significant renovations of their homes in the near future (for homeowners), and what existing or potential neighborhood improvements will influence their decision to leave or stay on the NWS over the long term. The goal of the survey will be to supplement the Residential Market Analysis described as Task 2.7.

- a) Consultant will provide DCD with draft questions for the survey. The Consultant will refine and revise the questions in consultation with DCD and NWSP.
- b) Consultant will administer the survey using a mobile-friendly web-based platform of Consultant's choice during a three week period.
- c) DCD and NWSP will work with consultant to electronically disseminate an invitation to the survey to NWS residents using existing mailing lists, NWSP networks, etc. Consultant shall also budget for mailing a postcard invitation to complete the survey to 1,000 households in the study area.
- d) Consultant will prepare a quantitative analysis of the survey results to be included as an appendix to the Final Report.
- e) Key survey findings will be incorporated into the body of the Final Report and utilized to inform the Residential Market Analysis.

RFP TECHNICAL REQUIREMENTS FOR DCD PLANS

Software and file formats used in the preparation of the plan and all supporting documents

Software compatibility must be evaluated and approved by DCD Planning before commencement of the project. Note that DCD Planning uses only Windows software. General requirements are:

- a. Microsoft Word (2007) for early drafts of text and editing
- b. ArcMap (version 10.0)
- c. Microsoft Excel (2007) for all charts
- d. High resolution JPEG or PDF for all images



CITY OF MILWAUKEE
OFFICE OF SMALL BUSINESS DEVELOPMENT
FORM A - CONTRACTOR COMPLIANCE PLAN

This compliance plan must be completed in its entirety by the apparent low bid contractor within three (3) working days after the identification of the "low bidder," regardless of SBE participation or lack thereof.

I. GENERAL INFORMATION (REQUIRED)

BID # _____ SBE Participation: _____% Total Dollar Amount: \$ _____

BID Description: _____

II. PRIME CONTRACTOR INFORMATION (REQUIRED)

Contractor Name: _____

Address: _____

City/State/Zip: _____

Contact Person: _____ Title: _____

Phone: _____ Fax: _____ Email: _____

Print Name: _____ Title: _____

City of Milwaukee SBE Certification: _____ Yes _____ No

III. ACKNOWLEDGEMENT (REQUIRED)

I certify that the information included in this Compliance Plan is true and complete to the best of my knowledge. Failure to submit this form and/or meet the specified SBE requirements may render the Bid/RFP unresponsive.

Name of Authorized Representative: _____ Title: _____

Signature: _____ Date: _____

FOR STAFF USE ONLY

Reviewed by OSBD Staff: _____ Date: _____

**CITY OF MILWAUKEE
OFFICE OF SMALL BUSINESS DEVELOPMENT
CONTRACTOR COMPLIANCE PLAN**

List all subcontractor information in its entirety. Only SBE firms certified through the City Of Milwaukee Office of Small Business Development will be counted towards specified SBE requirements. Individual subcontractor SBE percentages should equal the overall participation as listed on Page 1. Please visit the OSBD website www.milwaukee.gov/osbd for a complete list of certified firms.

IV. SUBCONTRACTOR INFORMATION

Subcontractor Name: _____

Contact Person: _____ Title: _____

Phone: _____ Fax: _____ Email: _____

Owner/Representative Signature: _____ Date: _____

Work performed / Materials supplied: _____

City of Milwaukee SBE Certification ___ Yes ___ No

Please identify the proposed award amount and percentage of the contract the subcontractor will fulfill (if applicable).

Proposed Award: \$ _____ Percentage of contract: _____%

Subcontractor Name: _____

Contact Person: _____ Title: _____

Phone: _____ Fax: _____ Email: _____

Owner/Representative Signature: _____ Date: _____

Work performed / Materials supplied: _____

City of Milwaukee SBE Certification ___ Yes ___ No

Please identify the proposed award amount and percentage of the contract the subcontractor will fulfill (if applicable).

Proposed Award: \$ _____ Percentage of contract: _____%

PLEASE DUPLICATE AS NEEDED TO PROVIDE ADDITIONAL SUBCONTRACTOR INFORMATION

Department of Administration - Business Operations Division
Office of Small Business Development
City Hall, Room 606
200 East Wells Street
Milwaukee, WI 53202
Information Line: 414-286-5553 Fax: 286-8752
www.milwaukee.gov/osbd

ATTACHMENT C

DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

Material submitted in response to DCD's Request for Proposals No. 57673 includes proprietary and confidential information that qualifies as a trade secret, as provided in Wis. Stats. §§ 19.36(5) & 134.90, or is otherwise material that can be kept confidential under the Wisconsin Public Records Law. As such, the proponent asks that certain pages, as indicated below, of this proposal be treated as confidential material and not released, to the extent allowed by Wisconsin law. Therefore, I am providing the following information with the express understanding that it is being submitted to DCD under a pledge of confidentiality. I would not have submitted this information had DCD not pledged to keep it confidential* and request that the following pages not be released:

<u>Section</u>	<u>Page</u>	<u>Topic</u>

*NOTE: Proponents are cautioned that the ENTIRE PROPOSAL WILL NOT FALL WITHIN THE CONFINES OF THE PLEDGE OF CONFIDENTIALITY. PLEASE LIMIT DESIGNATIONS OF CONFIDENTIALITY ONLY TO PROPRIETARY OR TRADE SECRET INFORMATION, OR OTHER LIMITED INFORMATION THAT YOU PROVIDE ONLY UPON RECEIPT OF A PLEDGE OF CONFIDENTIALITY

IN THE EVENT THE DESIGNATION OF CONFIDENTIALITY OF THIS INFORMATION IS CHALLENGED, THE UNDERSIGNED HEREBY AGREES TO PROVIDE LEGAL COUNSEL OR OTHER NECESSARY ASSISTANCE TO DEFEND THE DESIGNATION OF CONFIDENTIALITY.

Failure to include this designation in the proposal response may mean that all information provided, as part of the proposal response will be open to examination and copying.

<hr/> Signature (Authorized Representative)	<hr/> Telephone Number
<hr/> Name (Please Print)	<hr/> Company Name
<hr/> Title	<hr/> Date

NOTE: DCD, as custodian of these public records has the obligation, pursuant to the Public Records Law, to determine whether the above information can be kept confidential.

DCD will notify any proponent if a determination is made that the requested information cannot be kept confidential.

PROPRIETARY INFORMATION: Proprietary information submitted in response to this request for proposal will be handled in accordance with applicable DCD procurement regulations. A proponent responding to this proposal should not include any proprietary information as part of its proposal unless the proponent 1) designates the specific information that it maintains is proprietary and the reason(s) for such designation in a separate document to DCD, Purchasing/Contract Services Division and 2) identifies the specific information when it occurs within the proposal.

DCD's preference is for the proponent to segregate all information designated as confidential into one section of the Request for Proposal and/or a separate document for easier removal to maintain its confidential status. The response to the proposal should indicate which portion of the requested information is confidential and where this information is located within the response, i.e. under separate cover, in confidential Section No. _____, etc. Data contained in the proposal and all documentation becomes the property of DCD, Purchasing Division.

Generally, proposals are available for public review after the Purchasing/Contract Services Division has awarded and executed a contract.



DEPARTMENT OF ADMINISTRATION
BUSINESS OPERATIONS DIVISION
PROCUREMENT SERVICES SECTION

LOCAL BUSINESS ENTERPRISE (LBE) PROGRAM
AFFIDAVIT OF COMPLIANCE

IMPORTANT: This form must be submitted with your bid to be considered for LBE status.

Bid/RFP #: _____

Company Name: _____

Address: _____

City, State, Zip _____

This affidavit of compliance will be the contractor's sworn statement that the business meets the following criteria:

- The business owns or leases property within the geographical boundaries of the City of Milwaukee. Post office boxes shall not suffice to establish status as a Local Business Enterprise.
- A residential address may suffice to establish compliance as a Local Business Enterprise, but only if the business does not own or lease other real property, either within or outside the geographical boundaries of the City of Milwaukee.
- Leased property shall not suffice to establish compliance as a Local Business Enterprise unless at least half of the acreage of all the real property owned or leased by the business is located within the geographical boundaries of the City of Milwaukee.
- The business has owned or leased real property within the geographical boundaries of the City of Milwaukee *and* the business has been doing business in the City of Milwaukee for at least one (1) year.
- The business is not delinquent in the payment of any local taxes, charges or fees, or the business has entered into an agreement to pay any delinquency and is abiding by the terms of the agreement.
- The business will perform at least 10% of the monetary value of the work required under the contract.

NOTE: If you are the primary owner of more than one business location and the other business location(s) is not located within the geographical boundaries of the City of Milwaukee, the business you are seeking to qualify as a Local Business Enterprise must serve as the primary functionally operational entity that is capable of providing the required services, commodities, or supplies for the purposes of this Bid/RFP. If you own more than one business, please list the name of the business(es) and their addresses on the "Business Property Location" form.

SITE VISITS: Please note the contractor agrees to allow the City to verify Local Business Enterprise status by allowing City Staff to visit the operation(s) of the business that is seeking Local Business Enterprise status at any time without notice, in an effort to maintain the integrity of the City's bidding process.

I hereby declare compliance with the City of Milwaukee Code of Ordinances Chapter 365.

Authorized Signature: _____

Printed Name: _____

Date: _____

NOTARIZATION

Subscribed to before me on this _____ day of _____ in the year _____, at
_____ County, _____ State.

NOTARY PUBLIC SIGNATURE: _____

(SEAL)

PRINT NAME: _____

My commission expires: _____

PLEASE SUBMIT THIS FORM WITH YOUR BID OR PROPOSAL



**DEPARTMENT OF ADMINISTRATION
BUSINESS OPERATIONS DIVISION
PROCUREMENT SERVICES SECTION**

**LOCAL BUSINESS ENTERPRISE (LBE) PROGRAM
BUSINESS PROPERTY LOCATION FORM**

Important Note: This form must be submitted with your bid to be considered for LBE status.

Bid / RFP # _____

Property Location 1

Name:	
Address:	
City, State, Zip	

Property Location 2

Name:	
Address:	
City, State, Zip	

Property Location 3

Name:	
Address:	
City, State, Zip	

Property Location 4

Name:	
Address:	
City, State, Zip	

PLEASE SUBMIT THIS FORM WITH YOUR BID OR PROPOSAL