REQUEST FOR PROPOSAL
FOR
Project Management Services

ISSUED BY:

WISCONSIN ECONOMIC DEVELOPMENT CORPORATION

ON: FRIDAY, JULY 31, 2020

All questions regarding this RFP must be submitted in writing to Kathie Colbert, at kathie.colbert@wedc.org by Friday August 14, 2020, at 4:00 pm CT.

PROPOSALS MUST BE SUBMITTED BY:

FRIDAY, AUGUST 21, 2020, 4:00 PM CT

To:
Kathie Colbert
Wisconsin Economic Development Corporation
201 West Washington Avenue, 6th Floor
Madison, WI 53703

THINK·MAKE·HAPPEN.
I. **Scope of Work**

The purpose of this Request for Proposal (RFP) is to provide interested proposers with the information needed to prepare and submit a proposal for the following:

a. **Description of the Project**

The Wisconsin Economic Development Corporation (WEDC) is looking for project management services to assist WEDC as we move into new Madison office leased space, prior to June 30, 2021.

An initial space needs assessment has been performed and the targeted square footage currently being sought is between 23,000 to 27,000 rentable square feet. WEDC is in the midst of the site selection process and expects to enter into a lease by October 1, 2020. Depending on the selected site, the tenant improvement process is expected to commence shortly thereafter and be completed no later than June 1, 2021.

The objective of requesting proposals at this time is to determine which firm can offer the highest quality of service at the most reasonable cost.

b. **Summary of Services Required**

The successful proposer will provide WEDC with the following services:

i. **Project Planning** – includes all budget and schedule development. Refine budget and schedule, as needed, and throughout the tenant improvement construction period.

ii. **General Contractor Selection** – manage the general contractor selection process, including the development and administration of the request for proposal (RFP) process, subject to WEDC’s procurement policy and procedures for competitive bidding. Evaluate RFP responses, prepare comparison analysis of cost for WEDC staff, and assist in the negotiation of the final contract.

iii. **Collaboration** – coordinate and work with WEDC’s partners, including the general contractor, developer, developer’s general contractor, design architect, and real estate broker, as needed, throughout the contract period.

iv. **Construction and Close-out** – maintain budget and expenditures, monitor the general contractor construction progress, tracking variances to budget and schedule. Enforce project schedule requirements and manage disputes between WEDC’s partners, including the general contractor, developer, developer’s general contractor, and design architect, throughout the construction period.

In addition, the proposer may also bid on the following services (these services are not required to be bid on by the proposer, but if the proposer elects to bid they must provide the cost as a separate line item from other services to be provided):

v. **Furniture Selection Assistance** – manage the furniture and fixture vendor selection process. Develop a scope document showing a basis of design for furniture, fixtures and finishes, quantities, and an overall budget. Solicit and select applicable vendors, subject to WEDC’s procurement policy and procedures for competitive bidding. Assist with installation and final punch list items as needed.
vi. Relocation Coordination and Management – manage the mover selection process. Solicit and select applicable vendors, subject to WEDC’s procurement policy and procedures for competitive bidding.

II. Project Timeline

Proposers responding to this RFP must be prepared to conform to the following timeline. If this timeline is prohibitively restrictive, please indicate such and propose an alternate timeline.

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>July 31, 2020</td>
<td>RFP Issued</td>
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<tr>
<td>August 14, 2020</td>
<td>Deadline to Submit Questions</td>
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<tr>
<td>August 21, 2020</td>
<td>Proposals Due</td>
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<tr>
<td>August 28, 2020</td>
<td>Committee Review of Proposals</td>
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<tr>
<td>August 31 or Sept. 1, 2020</td>
<td>Possible Interviews with Proposers</td>
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<td>September 11, 2020</td>
<td>Anticipated Approval of Proposal</td>
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<td>September 18, 2020</td>
<td>Commencement of Services</td>
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<td>June 30, 2021</td>
<td>Expected Completion of Services</td>
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III. Wisconsin Economic Development Corporation

The Wisconsin Economic Development Corporation (WEDC) is a public body corporate and politic governed by Chapter 238 of the Wisconsin Statutes. WEDC was created under 2011 Wisconsin Act 7 and 2011 Wisconsin Act 32 to replace the economic and community development operations of the former Wisconsin Department of Commerce and to serve as the State of Wisconsin’s lead economic development organization. WEDC is governed by a Board of Directors. WEDC’s Chief Executive Officer is appointed as directed by statute.

WEDC provides financial and technical assistance and services to businesses and organizations in Wisconsin for the purpose of strengthening economic development and creating and retaining jobs. As of June 30, 2019, WEDC had approximately 118 employees, a cash and investment balance $96.7 million, and annual operating expenditures of $54.1 million. Revenues to finance its operating budget are derived primarily from state appropriations, loan repayments and other income.
WEDC operates four economic and community development divisions and nine finance and administrative departments primarily in the Madison, Wisconsin location. WEDC provides grants, loans, loan guarantees, tax credits and other financial and technical assistance to its customers.

IV. Proposal Requirements

Proposers responding to this RFP must provide sufficient responses to all of the below requests for information. Failure to respond to any of the requests may result in disqualification of the proposal.

a. Mandatory Requirements/Minimum Qualifications
   - Proposers must have a minimum of five years of experience in providing similar services.

b. Organizational and Staff Capabilities
   - Provide a brief description of the proposer’s history and organization.
   - Describe the proposer’s experience providing project management services. Please highlight experience providing such services to local or state agencies, or non-profit organizations.
   - Provide a list of at least three recent engagements which indicates relevant experience.
   - Provide a list of all staff persons who will be involved in carrying out the tasks covered by this RFP, describing each in terms of their involvement in specific tasks and qualifications related to the Scope of Work.
   - Provide an experience summary for each staff person proposed to provide services under this RFP.
   - Provide a list of any subcontractors (individual or organizational) that the proposer intends to use when providing services under this RFP (Note: the proposer is not required to use subcontractor(s). However, no subcontractor may be used without WEDC’s written approval.)

c. Approach to the Project
   - Describe, in detail, the proposer’s approach to the project, as it meets the Scope of Work as described in Section I above, which includes project planning, general contractor selection, collaboration with partners and consultants, and construction and close out.
     o If providing an additional proposal for furniture and fixture selection and/or relocation coordination and management, please describe, in detail, the proposer’s approach to those services, as described in Section I above.
   - Provide a timeline for conducting the scope of work proposed under this RFP. Due to the undetermined start date of this project, the timeline does not need to be date specific.

d. Other Items (if applicable)
   - Please describe items not included in the scope of work under this RFP that the proposer recommends be completed. Include the price for any such extra items in the cost proposal as additional costs.
V. Cost Proposal

Proposers should provide a fixed cost proposal, including anticipated out of pocket costs. The cost proposal should include the estimated number of hours and the billing rate for each level of team member assigned to the engagement and broken out by the service to be provided. The cost proposal shall be a “not to exceed” total cost for the services to be provided under this RFP.

VI. Terms and Conditions

The following terms and conditions affect responses to this RFP and any resulting contract. These terms shall be adhered to by any interested proposer and are non-negotiable.

a. Contract Term

The contract term shall be for up to 18 months, concluding with the successful move into the new lease space, which is currently expected to be June 30, 2021, but may be as early as March 31, 2021 or as late as December 31, 2021.

WEDC may, upon thirty (30) days written notice, terminate the contract for any reason or for no reason at its sole discretion.

b. Confidentiality

Proposer acknowledges that all information, data, records and documents disclosed by WEDC to proposer, or which come to proposer’s attention during the course of its response to this RFP or performance under any resulting contract constitute valuable and proprietary assets of WEDC (Confidential Information). Proposer agrees not to disclose the Confidential Information, either directly or indirectly, to any person, entity or affiliate, unless required to do so by legal process of law, without prior authorization by WEDC. If required to disclose Confidential Information by legal process, proposer shall provide WEDC with prompt notice so WEDC may seek an appropriate protective order. Except as required to respond to this RFP or during the course of its performance under the terms of any resulting Agreement, proposer shall not use any Confidential Information for its own purposes.

c. Conflict of Interests

Proposers’ response to this RFP must include, in writing, the disclosure of any potential conflict of interests that may arise from proposer’s performing services for WEDC. Any resulting contract will require that if a vendor fails to disclose a potential conflict of interest, and if WEDC determines such failure to disclose involves a material conflict of interest, the vendor’s contract may be declared to be void by WEDC and any amounts paid under the contract may be recovered by WEDC. Vendors shall advise WEDC of any changes in potential conflicts of interest.

d. Nondiscrimination

Pursuant to Wisconsin law, any contract resulting from this RFP will include the following language regarding nondiscrimination:
In connection with the performance of work under this contract, vendor agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, handicap, sex, physical condition, developmental disability as defined in § 51.01(5), sexual orientation or national origin. This provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. Except with respect to sexual orientation, vendor further agrees to take affirmative action to ensure equal employment opportunities. Vendor agrees to post in conspicuous places, available for employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of the nondiscrimination clause.

e. Public Records and Retention
Responses to this RFP, any communication with WEDC, any resulting contract, work product, and other materials submitted to WEDC may constitute public records subject to disclosure under Wisconsin’s Public Records Law, Wis. Stat. § 19.31 et seq. Proposers shall mark documents “confidential” where appropriate for financial and other sensitive materials that should, to the extent possible under the law, be kept in confidence. If awarded the contract, the proposer shall establish and maintain adequate records of all documentation developed or compiled and expenditures incurred under the contract and retain all such records for three (3) years following final payment. Alternatively, WEDC may elect to have the proposer provide WEDC with all records produced or collected under the contract in lieu of retaining said documents.

f. Any contract resulting from this RFP will include the following language regarding examination of records:

    WEDC shall at any time during normal business hours, upon reasonable notice, have access to and the right to examine, audit, excerpt, transcribe, and copy, on Vendor's premises, any of the Vendor’s records directly pertinent to this Agreement. This provision shall survive for three (3) years after the termination, cancellation, or expiration of this Agreement.

g. Insurance
If awarded the contract, the proposer shall, at its expense, obtain and maintain adequate liability insurance insuring the proposer against any claims, demands, causes of action, and liability arising from and in connection with the proposer’s services under the contract.

VII. RFP Process

a. Reasonable Accommodations
    WEDC will provide reasonable accommodations, including the provision of informational material in an alternative format, for individuals with disabilities upon request.

b. Communication with WEDC & Submitting Questions
All communication regarding this RFP shall be directed to Kathie Colbert at kathie.colbert@wedc.org. Information regarding this RFP obtained from other sources is unofficial and nonbinding. Communication with other sources may be cause for rejection of a proposal. All questions regarding this RFP must be submitted in writing to Kathie Colbert by Friday, August 14, 2020, at 4:00 p.m. CT.

c. **Incurring Costs**
   WEDC is not liable for any cost incurred by a proposer for responding to this RFP.

d. **News Releases**
   News releases pertaining to the RFP, the acceptance, rejection, or evaluation of proposals shall not be made without the prior written approval of WEDC.

e. **Submitting the Proposal**
   Proposers shall submit an electronic, PDF, version of their proposal, or four hard copies of their proposal to Kathie Colbert, no later than **Friday, August 21, 2020, at 4:00 p.m. CT.** WEDC will accept either electronic or hard copy submissions, but the submission must be received by WEDC by the deadline for the proposal to be considered submitted on time. Proposal responses should follow the sequence and outline presented in this RFP. Proposals shall be delivered to:

   Kathie Colbert  
   Kathie.colbert@wedc.org  
   Wisconsin Economic Development Corporation  
   201 West Washington Avenue, 6th Floor  
   Madison, WI 53703

### VIII. **Evaluation of RFP**

a. **Proposal Review, Verification, and Acceptance**
   WEDC shall review each proposal to verify that it meets all specified requirements in the RFP. WEDC may seek clarification on any response and/or require additional information from any applicant or call for new responses. Proposals that do not comply with instructions contained in the RFP may be rejected by WEDC. WEDC reserves the right to waive a particular specification if no proposer meets that specification. WEDC may request reports on the proposer's financial stability. WEDC may reject a proposal if the proposer is determined to have inadequate financial means to provide the required service. WEDC retains the right to accept or reject any or all proposals, or accept or reject any part of a proposal, determined to be in the best interest of WEDC. WEDC shall be the sole judge as to compliance with the instructions contained in this RFP. Proposals shall be firm for acceptance for sixty (60) days from date of receipt of proposal unless otherwise noted. A proposer may not modify its proposal after submission except to correct minor omissions or miscalculations as directed in writing by WEDC.

b. **Evaluation Criteria**
Mandatory requirements must be met in order for a proposal to be considered for selection under this RFP. Evaluation of the proposals will be based on the proposer’s ability to provide and meet the Scope of Work, and cost.

c. **Right to Reject Proposals and Negotiate with Proposers**
   WEDC reserves the right to reject any and all proposals. WEDC may enter into negotiations with multiple vendors regarding the terms of the contract and the cost proposal before determining the highest scoring proposer.

d. **Award Decision**
   WEDC will select the proposal deemed to provide the services described in this RFP at the best value to WEDC, taking into consideration, amongst other factors, the proposers' experience, expertise, and cost proposals.

e. **Notice of Intent to Award**
   All proposers who respond to this RFP will be notified in writing of WEDC’s intent to award the contract as a result of this RFP.