

REQUEST FOR PROPOSALS
FOR
Certified Sites Program Services

ISSUED BY:

WISCONSIN ECONOMIC DEVELOPMENT CORPORATION

ON: September 21, 2021

All questions regarding this RFP must be submitted in writing to Patrick Roetker at patrick.roetker@wedc.org by October 1, 2021 at 4:00 pm CT.

**PROPOSALS MUST BE SUBMITTED BY:
October 22, 2021 4:00 PM CT**

To:
Patrick Roetker
patrick.roetker@wedc.org

I. Scope

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

The Wisconsin Economic Development Corporation (WEDC) requests proposals from qualified firms interested in providing site certification services to WEDC. This Request for Proposal (RFP) is issued for the purpose of identifying the most qualified firm that may best serve WEDC on the development and administration of a site certification program at the best overall value to WEDC.

The purpose of the Certified Sites program is to continue to create consistent standards for industrial site certification in Wisconsin. “Certification” communicates that the key approvals, documentations and assessments most commonly required for industrial uses will already be in place. Certification criteria have been developed based on representative needs of advanced manufacturing projects. This designation provides critical information to site selectors and executives of companies interested in locating in Wisconsin that these sites are “ready to go”.

More information on WEDC’s Certified Sites program can be found on WEDC’s website at: <https://inwisconsin.com/doing-business-in-wisconsin/available-sites/certified-sites/>

Experienced firms that wish to be considered as potential certified site program service providers are asked to submit a proposal describing their level of expertise in site selection and site certification services and proposed fee structure. **The term of the proposal shall include review and certification of up to three sites per year for three sequential years.**

II. Project Timeline

The work needed to be completed under this RFP is subject to tight timing constraints. 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.

| Date | Event |
|----------------------|------------------------------------|
| September 21, 2021 | RFP Issued |
| October 1, 2021 | Deadline to Submit Questions |
| October 22, 2021 | Proposals Due |
| Oct 25 – Nov 5, 2021 | Committee review of Proposals |
| November 15, 2021 | Possible Interviews with Proposers |
| November 29, 2021 | Approval of Award |

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 an eighteen-member Board of Directors. WEDC's Chief Executive Officer is appointed by the Governor.

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, 2021, WEDC had approximately 106 employees and an operating budget of approximately \$62 million. Revenues to finance its operating budget are derived primarily from state appropriation, loan repayments and other income.

WEDC operates five economic and community development divisions and eight 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. WEDC utilizes the Intacct accounting system as well as Salesforce and a grant and loan management system.

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. Organizational and Staff Capabilities

- i. Provide a brief description of the proposer's history and organization.
- ii. Describe the qualifications of the proposer to develop and administer a site certification program under this engagement. Include information about pertinent prior experience, specialized expertise, and resources that the proposer can bring to a project under this engagement.
- iii. Provide a list of at least three relevant engagements held by the proposer which indicates relevant experience. Discuss the professional qualifications, experience, and education that each person brings to the engagement. Include a statement of any regulatory action taken within the past five years by an oversight body against any personnel who would be assigned work under this engagement.
- iv. 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.
- v. 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.)

b. Technical Requirements/Approach to the Project

- i. Describe, in detail, the proposer's technical approach to the project
- ii. Describe the proposer's criteria and key elements used in site certification.
- iii. Describe proposer's process and approach to the review of application submissions, selection and ultimate site certification.
- iv. Provide names, addresses, and telephone numbers of three client references.

- v. Provide a timeline of work to be done in taking applicants through the process of certification.
- vi. Describe how completed projects will be communicated back to WEDC.

c. Documents

- i. Provide a copy of the proposer's W-9.
- ii. Provide a copy of the proposer's standard contract documents.

V. Cost Proposal

Proposers should provide a *fixed cost proposal* for the services to be provided under this RFP, including anticipated out of pocket costs. The cost proposal should provide the three-year cost for the engagement and be divided into two categories: (1) administration of the Certified Sites Program; and (2) the per-site fee for certifications. The administrative fees will be paid directly by WEDC, and the per-site fee will be invoiced to the communities requesting the site certification. Include for each category the estimated number of hours and the billing rate for each level of team member assigned to the engagement. The cost proposal total shall not 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 will cover review and certification of up to three sites per year for three sequential years.

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, 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. *This language may change with the new procurement policy.*

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, Licensor 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, Licensor further agrees to take affirmative action to ensure equal employment opportunities. Licensor agrees to post in conspicuous places, available for employees and applicants for employment, notices to be provided by the recipient officer setting forth the provisions of the nondiscrimination clause.

e. Public Records

Responses to this RFP, any communication with WEDC, and any resulting contract and work product are subject to the public records laws of the State of Wisconsin, § 19.31 et seq. Proposers shall mark documents “confidential” where appropriate for financial and other sensitive materials that should be, to the extent possible, be kept in confidence. WEDC will notify the proposer if it receives a public records request for materials marked confidential.

f. Insurance

If awarded the contract, the proposer shall maintain Worker’s Compensation, Comprehensive General Liability, including Contractual Liability, and Automobile Liability insurance for any claims that may arise from operations 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 WEDC’s Protocol Officer, Patrick Roetker at Patrick.roetker@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 WEDC’s Protocol Officer, Patrick Roetker by **October 1, 2021 at 4:00 p.m. CST.**

c. Incurring Costs

WEDC is not Liabile for any cost incurred by a vendor for responding to this RFP.

d. News Releases

News releases pertaining to the RFP or to 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 to WEDC's Protocol Officer, Patrick Roetker at patrick.roetker@wedc.org, no later than **Friday, October 22, 2021 at 4:00 p.m. CST**. Proposal responses should follow the sequence and outline presented in this RFP. If needed, WEDC will supply a link to a cloud-based folder as an alternative to email.

Proposals shall include a cover page which is signed and includes the firm name, address, telephone number, and name of the person authorized to submit the proposal, along with the person's title, email, and telephone number. If the firm operates from more than one location, please specify the office to which projects would be assigned.

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. 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 proposal opening 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. Proposal Evaluation and Scoring

Proposals will be evaluated and scored based on the following criteria:

- i. Relevant experience of the firm and of key personnel, including professional qualifications; specialized experience and technical competence; reputation of personnel for working in an efficient, effective, proactive, and ethical manner; experience; relationships or activities that might present a conflict of interest for the firm or WEDC.
- ii. Ability to advise and represent WEDC in an effective and efficient way.
- iii. Quoted fee rates as applied by WEDC to its proposed need for services.
- iv. Any other factors relevant to the determination of which proposer should be selected.

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. WEDC shall not, under any circumstances, reveal a proposer's cost proposal to any other proposer prior to contracting for services.

d. Award Decision

WEDC will make the award to the proposer deemed to provide the services described in this RFP at the best value to WEDC, taking into consideration 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.