

**REQUEST FOR QUALIFICATIONS
FOR
Coordinated Strategic Planning Services**

**ISSUED BY:
WISCONSIN HOUSING AND ECONOMIC DEVELOPMENT AUTHORITY (WHEDA)**

DATED: May 20, 2013

SUBMITTALS DUE BY 3:00 P.M. (CST) ON JUNE 26, 2013

TO:

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RFQ can be accessed here: <http://www.wheda.com/root/WorkingWithWHEDA/>
Transform Milwaukee background can be accessed here: <http://www.transformmilwaukee.com/>

Transform Milwaukee Strategic Action Plan

I. INTRODUCTION

The Wisconsin Housing and Economic Development Authority (WHEDA) in conjunction with the Wisconsin Economic Development Corporation (WEDC) request the submission of qualifications (RFQ) from economic development, urban planning, intermodal transportation planning, housing, and workforce development consulting firms or a consultant team interested in developing a coordinated Strategic Action Plan (Plan) for the defined Transform Milwaukee area. This RFQ is the initial step which will result in a formal request for proposals (RFP) to follow for contracting. Firms/teams are encouraged to submit for the RFQ to best provide qualifications and experience of the firm(s) and respective staff members. Firms/teams will also have the opportunity to propose their own project approach or scope elements which may be considered for inclusion in the formal RFP. WHEDA and WEDC both understand the time and effort required by firms to submit for either a RFQ and/or RFP. To reduce the time and effort required for producing a submission for a RFQ and a RFP, certain requirements for the RFP will not need to be resubmitted if the firm or team submits for the RFQ with applicable information. The RFQ also allows for extended qualifications of the firm and key staff members as well as extended approach methodology.

II. BACKGROUND

Project Leads: WHEDA & WEDC

WHEDA was created in 1972 by the Wisconsin legislature (Chapter 234, of the Wisconsin Statutes) to provide and promote an adequate supply of housing for persons and families of low and moderate income throughout Wisconsin. WHEDA's mission has expanded to include financing for economic development (primarily loan guarantees) and agribusinesses.

WHEDA is not a state agency, but rather is a "public body corporate and politic." Its operating budget is not included in the state budget and is not subject to legislative appropriation. Revenues to finance its operating and capital budgets are derived primarily from interest earnings on loans, investments of assets, and administrative fees. Most of WHEDA's programs are funded from proceeds of tax-exempt and taxable bonds. Other sources of funding include WHEDA's general fund monies that are available after setting aside required reserves, and funds made available by the legislature for certain agricultural and economic development programs administered by WHEDA.

WHEDA is governed by a twelve-member Board of Directors. WHEDA's Executive Director, Wyman Winston, who was appointed by the Governor, and acts as its CEO.

WEDC, as the state's lead economic development organization, nurtures business growth and job creation in Wisconsin by providing resources, technical support, and financial assistance to companies, partners and the communities they serve. WEDC has key areas of focus to elevate Wisconsin's economy:

- Economic and Community Development – Elevate Wisconsin's economy by investing in high quality job creation and expansion and by enabling a world-class, high performing state economic development network.

- Entrepreneurship and Innovation – Elevate Wisconsin’s economy by increasing the amount of R&D and investment capital and by providing an effective entrepreneurship support network.
- Business and Industry Development – Elevate Wisconsin’s economy by advancing targeted, high growth business consortia and industry sectors
- International Business Development – Elevate Wisconsin’s economy by increasing Wisconsin exports, increasing foreign investment and expanding export assistance capacity in the state
- Marketing and Public Affairs – Elevate Wisconsin’s economy by advancing business growth supporting policies and promoting Wisconsin as a business-friendly location
- Finance and Administration – Elevate Wisconsin’s economy by providing WEDC and its economic development partners with the tools, technology and support necessary to meet strategic goals and operational advantage.

Transform Milwaukee

Transform Milwaukee was established by Governor Walker and WHEDA on April 30th, 2012 with the announcement of WHEDA’s pledge of \$100 million in investments in the City of Milwaukee over the first 24 months of the 120 month initial horizon. This pledge has the aim of leveraging over another \$100 million in public and private financing, resulting in over \$200 million in identifiable projects and program initiatives in the Transform Milwaukee area in the first 24 months. The five primary strategies of Transform Milwaukee are:

- **Expand** business development and innovation with new financing resources to spur job creation
- **Reduce** the surplus of foreclosed and vacant properties to make neighborhoods more desirable for housing and business development
- **Foster** partnerships between state agencies and nonprofit community groups to increase job training, skills enhancement and educational opportunities
- **Create** storm water runoff conveyance systems – bioswales – as an alternative to storm sewers where applicable to prevent damage from future flooding events
- **Direct** resources to established intermodal transportation infrastructure – water, air, rail and highway systems – to ensure the efficient transportation of Milwaukee-based products to national and global markets

WHEDA, along with their partner organizations, has established a defined area in which to focus and leverage investment in the City of Milwaukee. This effort is Transform Milwaukee, which is a public-private partnership seeking to improve economic development/business attraction, improve infrastructure, foster entrepreneurship, maximize the human capital potential of the region, mitigate foreclosures, coordinate resources/efforts and partnerships, and integrate the minority/diversity dividend.

Currently, WHEDA has defined the geographic boundaries of focus for Transform Milwaukee. The boundaries were established around the (5) major industrial cores of the city: Riverworks, Century City Corridor (30th Street Corridor), Menomonee River Valley, Port of Milwaukee, and Aerotropolis of the General Mitchell International Airport area and the catalytic projects identified by seven of the City’s Area Plans. In the industrial cores, each is in a different stage of redevelopment and the successes already in place should leverage and connect to areas of need. Where the Menomonee Valley has seen significant redevelopment efforts taking place over the last two decades, the Aerotropolis is beginning to emerge and make plans for first stage redevelopment and Century City is currently seeing final

preparation of sites to “shovel ready” status. Connections between these areas, even though they are in different stages, will aid in boosting areas of need and provide economic energies to the entire Transform area. The City’s Area Plans are also varied and identify different opportunities and constraints to catalytic redevelopment and housing/workforce stability.

III. PROJECT SERVICES DESIRED

In order to enhance the position of the City of Milwaukee and State of Wisconsin in the 21st century economy and workforce demands, WHEDA and WEDC are proposing a coordinated strategic planning effort called Transform Milwaukee Strategic Action Plan (Plan). The comprehensive planning effort is intended to coordinate the existing planning efforts already in place or in process and identify voids and/or disconnects between the efforts. The Plan will strategically prioritize catalytic action items which will spur continued momentum. As previously stated, Transform Milwaukee has different areas in various stages of stability and redevelopment. The Plan is intended to identify the short, medium, and long range action items to further each area’s objectives but more importantly connect and leverage the unique resources of each area together into a coherent and symbiotic system. This can be best illustrated in the desire for an interconnected intermodal transportation network but also translates to workforce development and housing stability. A prioritized list of action items will provide a next-steps timeline for partners in each of the areas to carry out and provide insight into progressive development guidance, workforce development, and housing stability in regards to timing and organization.

Considerable resources have been expended thus far on collecting data and research pertaining to the Transform Milwaukee area. Consultants are expected not to duplicate these efforts and instead utilize them to further their analysis, integrate planning efforts, identify voids/disconnects to remedy, and develop implementation recommendations. An initial and non-exhaustive list of existing planning efforts and data resources are available in Appendix A of this document. Consultants are encouraged to identify additional plans and data sources they feel are applicable to formulating the Plan. A preliminary list of websites has been identified in Appendix B which will provide greater insight into some of the key stakeholders in the Transform area.

The following list of services developed by WHEDA and WEDC is intended to function as a framework and not a fully detailed or exhaustive list. The bold sections are broad scope elements followed by questions associated with them. Respondents should use this list as a guide and should describe their approach and methodology to the challenges of formulating a Coordinated Strategic Action Plan. Overall, consultants should provide an approach they feel will best facilitate furthering of the Transform Milwaukee effort in the short, medium, and long range horizons.

1. Analyze existing data, research, planning efforts, and financial products relating to the Transform Milwaukee area

- a. Which studies or plan documents are most relevant?
- b. Where might some studies conflict?
- c. What data, research, or planning efforts may be missing and what would be the time needs and cost for completing those missing elements?
- d. How might action items identified in each planning effort be evaluated?
- e. Who are the key partners to success?

2. Synthesize the planning documents and research in a unified plan

- a. What are the short, medium, and long range elements?
- b. How does this relate to the five primary strategies of Transform Milwaukee?
- c. What pieces need to be filled in?
- d. Which elements have a strong relationship together?

3. Determine cost estimates for action items in the plan

- a. Who or what should be the source of funding?
- b. Are there other resources available?
- c. How will the implementation of one action item influence others?
- d. Is there revenue associated with implementation of one action item which would help fund others?

4. Prioritize action items

- a. Which action items are the most catalytic in nature?
- b. In which order do some action items need to be implemented?
- c. How do the action items relate to furthering the primary strategies of Transform Milwaukee?

5. Develop an implementation plan

- a. What are the short, medium, and long range action items?
- b. Which groups are responsible for implementation?
- c. What is the expected result of implementation of certain action items?
- d. How can action items be monitored for success?
- e. Who is responsible for coordinating efforts for implementation?

Transform Milwaukee covers a large portion of the City of Milwaukee with a diverse array of issues to be addressed. As such, the broad scope elements above will need to be tailored to specific areas in different ways. For example, the Aerotropolis is relatively early in its redevelopment evolution. Initial elements identified and to be coordinated within the full scope of Transform Milwaukee include:

- **Assess needs in the intermodal network**

- a. How does the airport connect with the rail, road, and waterway networks?
- b. What is the status of key intermodal transportation assets and what improvements are recommended?

- **Identification of development opportunities closely linked to the airport activity**

- a. Which businesses are attracted to locations with access adjacent to intermodal networks?
- b. What sites are most conducive to facilitating business needs?

- **Aligning development potential with land use and targeted incentives**

- a. How can land use and other development regulations encourage the highest and best use of the land in Aerotropolis?

- **Site preparation**

- a. What are the local, state, and federal funding sources for remediation or redevelopment?
- b. Which sites should be prioritized to be made “shovel ready” first?

In summation, WHEDA and WEDC are looking for consultants who can understand and outline the challenges of coordinating existing programs and partnerships to execute the planning efforts in the Transform Milwaukee area. Submittals should outline how the firm(s) would analyze planning efforts, prioritize action items, and finally develop an implementation plan. WHEDA and WEDC are looking for each firm's approach as to how they specifically might approach such a challenge as well as identify challenges or hurdles not yet identified.

IV. QUALIFICATIONS

A. Qualification of the Firm(s). Describe the qualifications of the firm to perform the work described above and/or proposed. Include information about pertinent prior experience (especially in the Milwaukee and M7 region). Specifically, describe the outcome of planning efforts conducted by your firm (and sub-consultants if applicable), and describe the firm's specialized expertise and resources that the firm can bring to this engagement. If the firm is utilizing sub-consultants, describe any past experiences in working together as well as the specialized expertise and resources of the sub-consultants.

B. Qualifications of Personnel. Identify the key personnel to be assigned to this project. Discuss the professional qualifications, experience, and education that each person brings to the engagement (1 page maximum per person).

C. Past Project Work. Provide names, addresses, and telephone numbers of at least three public sector clients and at least two private sector clients. Specifically list any clients who are currently in the Transform Milwaukee area and/or the M7 region. Submissions may also include a one page maximum synopsis "project sheet" for up to 5 projects similar or related to the scope to this project.

D. Timeline and Capacity for Completion.

Provide a preliminary timeline for major milestones for completion of this engagement as well as demonstrate the ability for the firm(s) to complete the proposed tasks in that timeline. Elements to include would be firm(s) project load, staff availability, and the identification of any barriers to completion.

E. Conflicts. Describe any existing or potential conflicts of interest of the firm (and sub-consultants if applicable) arising from representation of other parties or participation in other matters that might affect this engagement. Disclose all contractual or informal business arrangements/agreements, including fee arrangements, consulting agreements, and the nature of any project work, between the firm and WHEDA and/or WEDC staff and/or any of its Board members and any entity that provides services to WHEDA and/or WEDC.

F. Fee Range. Provide an estimated fee range of total cost associated with the engagement as it relates to the approach and scope proposed.

V. PROPOSAL DUE DATE AND PACKAGE REQUIREMENTS

Firms that wish to submit proposals should provide **four (4) color copies** of their proposal and one digital copy, no later than **3:00 p.m., CST, on June 26, 2013**, addressed as follows:

(Left bottom corner of envelope)

(To:)

Request for Qualifications: Coordinated Strategic Planning Services
WHEDA
Sherry Gerondale
201 West Washington Avenue, Suite 700
Madison, WI 53703

This RFQ and related planning studies and data resources are available on WHEDA's website at www.wheda.com/WorkingWithWHEDA/

VI. PROPOSAL INFORMATION UPDATES AND QUESTION/RESPONSE FORMAT

Firm(s) interested in receiving updates to the RFQ and would like to ask questions and receive responses in regards to the RFQ should send a single point of contact per firm to Sherry Gerondale via email at sherry.gerondale@wheda.com. Please title the email "Point of Contact for Transform Milwaukee Planning RFQ." Ms. Gerondale will disseminate all updates to the RFQ as well as send responses to questions submitted by firm(s) to all contacts interested via email. All questions must be submitted via email (no phone call please) with the email title "Questions for Transform Milwaukee Planning RFQ."

VII. PROPOSAL FORMAT AND CONTENT

To evaluate, WHEDA requests that all proposals be submitted according to the following format and content.

A. Cover Page and Letter of Interest (2 pages max). Proposals must be signed and include the firm name, address, telephone number, and name of the person authorized to submit the proposal, along with the person's title and telephone number. If the firm operates from more than one location, please specify the office to which this engagement will be assigned. If the firm is utilizing sub-consultants, the sub-consultants should be listed with their corresponding information.

B. Table of Contents (1 page max).

C. Approach and Scope Elements (12 pages max).

D. Statement of Qualifications (25 pages max).

VIII. REVIEW OF PROPOSALS

WHEDA and WEDC staff will review the RFQs following the deadline for submission on June 26, 2013. Staff will then evaluate the approaches and methodologies proposed and integrate those elements deemed most viable into a RFP. WHEDA and WEDC are not required to use any approaches outlined and may establish their own scope elements for the RFP.

IX. NON-DISCRIMINATION

WHEDA is committed to equal opportunity and nondiscrimination in all employment practices. In connection with the performance of any work under this RFQ, the proposer agrees to not discriminate against any employee or applicant for employment because of age, race, religion, creed, color, disability,

marital status, sex, national origin, ancestry, sexual orientation, reserve status, or any other characteristic protected by local, state, or federal ordinance, law or regulation. In connection with the performance of any work under this RFQ, the proposer agrees to take affirmative action to ensure equal employment opportunities.

Appendix A. Preliminary List of Planning Efforts and Data Resources see WHEDA website for links to these studies and potentially others to be added www.wheda.com/WorkingWithWHEDA/

WHEDA and WEDC do intend this list neither to be comprehensive nor to imply that all of these studies will need to be integrated in creating the Plan. Consultants should utilize this list as a starting point in familiarizing themselves with the planning efforts in or pertaining to the Transform Milwaukee area.

- 30th Street Corridor Economic Development Master Plan
- Aerotropolis Governance Comparison and Case Study Analysis
- Aerotropolis Milwaukee Presentation
- Be Bold Wisconsin Competitiveness Report
- Chicago Tri-State Alliance
- Community Development in Milwaukee: An Assessment and Recommendations
- Connections 2030
- Entrepreneurship in Milwaukee
- General Mitchell Airport Master Plan
- M7 Strategic Framework Brief
- MMSD Strategic Plan 2013
- Port of Milwaukee Presentation
- Port Redevelopment Plan Amendment
- Port Redevelopment Plan Design Standards
- Port Redevelopment Plan Updated
- River Works Center Report
- SEWRPC Regional Transportation System Plan 2035
- SEWRPC The Economy of Southeastern Wisconsin
- SEWRPC The Population of Southeast Wisconsin
- SEWRPC TIP 2013-2016
- UW-Extension Report Commission by WHEDA 2013
- The Wisconsin Manufacturing Study
- WisDOT Commodity and Freight Study

Milwaukee Area Plans in the Transform Milwaukee area

- Downtown Plan
- Fond du Lac North Plan
- Menomonee River Valley Plan
- Near North Plan
- Near South Plan
- Near West Plan
- South East Plan
- Third Ward Plan

Appendix B. Preliminary List of Useful Links

- Aerotropolis Milwaukee
<http://gatewaytomilwaukee.com/aerotropolis/>
- Babson Entrepreneurship Ecosystem Project (BEEP)
<http://www.babson.edu/enterprise-education-programs/babson-global/Pages/entrepreneurship-ecosystem.aspx>
- Century City Redevelopment
<http://city.milwaukee.gov/Projects/CenturyCity.htm>
- City of Milwaukee Planning Studies
<http://city.milwaukee.gov/Plansandstudies.htm>
- Choose Milwaukee - Milwaukee 7
<http://www.choosemilwaukee.com/>
- Menomonee Valley Partners
<http://www.renewthevalley.org/>
- Milwaukee Area Plans
<http://city.milwaukee.gov/Plansandstudies/AreaPlans.htm>
- Milwaukee Department of City Development
<http://city.milwaukee.gov/DCD>
- Milwaukee Metropolitan Sewage District
<http://www.mmsd.com>
- Port of Milwaukee
<http://city.milwaukee.gov/port>
- Riverworks Redevelopment
<http://www.riverworksmke.org/>
- Southeastern Wisconsin Regional Planning Commission
<http://www.sewrpc.org/SEWRPC.htm>
- Tri-State Alliance for Regional Development
http://chicagolandchamber.org/wdk_cc/programs_and_advocacy/tri-state_alliance.jsp
- Wisconsin Economic Development Corporation (WEDC)
<http://inwisconsin.com>
- Wisconsin Housing and Economic Development Authority (WHEDA)
<http://www.wheda.com>