



Request for Proposal

*Facility and Space Use Survey &
Strategic Master Plan*

Project Number: RC17-5001

February 28, 2017

RACINE COUNTY, WISCONSIN

REQUEST FOR PROPSAL

FACILITY AND SPACE USE
SURVEY & STRATEGIC MASTER PLAN

Introduction

Racine County is seeking a qualified and experienced firm (Firm) to provide a comprehensive facility and space use survey and strategic master plan (Plan) for all County departments and their respective divisions for County-owned and County-leased facilities. The majority of these entities currently reside in County owned facilities and are located throughout the entire county. It is recognized that as the County departments expand and contract, or alter their operations, space needs also change. In order to prepare for both the near future, and the long-term potential possibilities, a Plan is needed to assist in making efficient decisions related to personnel and service locations, work space layout, and square footage floor space requirements.

Expected work will include, but not necessarily be limited to, communications and meetings with County Executive Jonathan Delagrave, department heads, and their division managers deemed necessary to provide the Firm with information pertaining to County departments' current and projected work load, tasks, regulatory work, hours of operations, staffing levels and locations, inter-departmental work, technology interconnections, and any other information the Firm can reasonably expect to receive that is needed to prepare the final deliverable Plan.

Background

Racine County, located in southeast Wisconsin, currently has a population of approximately 195,000 people. County services are provided by a number of departments that accommodate the needs of the public, elected officials, courts, and County staff at buildings primarily owned, operated, and maintained by Racine County.

As the County government operation's model changes, due to growth or service requirements the need for department / division moves, combinations for efficiencies, cooperative workings, expansions, reductions, and site locations need to change but often are constrained or challenging.

Some preliminary departmental work space / building designs have been completed in the recent past, but a County wide Plan is needed to assist, give guidance, and provide potential solutions to make short term and future space Planning decisions that are efficient and provide maximum synergy to operations and service delivery.

From the information gained, the selected Firm will provide a detailed analysis of current departmental space allocations and locations and then provide the County detailed ideas and recommendations on how to change existing work spaces, expand to currently available new sites if needed, and formulate for long range changes or construction.

GENERAL INFORMATION

After review of the proposals, it is anticipated that the County will prepare a short list of possible Firms for consideration. The County may require those selected Firms to provide additional information and to make a presentation to the County.

The final selected Firm will be notified as soon as practical of the selection by the County. It is expected that contract negotiations will begin immediately thereafter. If contract negotiations cannot be successfully completed within two weeks, the County reserves the right to break off and begin contract negotiations with another bidder. County will use the standard AIA contract as a base model for the contract.

Please note that Racine County will incorporate into all professional contracts its own Standard Terms & Conditions; see attached Exhibit A.

All work will be performed in a professional and workmanlike fashion and in compliance with all applicable local, state and federal laws and regulations. The Plan will be completed to the satisfaction of the County and completion will be determined by the County, pursuant to this request and the supplied documents.

Racine County prefers that the Firm shall be a single entity for purposes of Planning and cost estimation services.

It is expected that the final draft of the Plan will be delivered to the County no later than Friday August 18, 2017.

Firm shall prepare and present routine progress reports to the County. The frequency of reporting shall be established by the County. The report shall briefly describe the progress during the preceding period, activities planned for the upcoming periods, and deviations from the County approved work schedule and any delays, along with steps taken to alleviate the impact of such delays to the schedule. Additionally, the Firm shall immediately report any item, task, or reason that may be billable time by the Firm or their sub-contractors outside of contracted work.

Related to recent space designs and expansions, all documents currently within the County's possession will be made available to the Firm for their investigation and possible inclusion within the Plan.

Within reasonable expectations and abilities, County will make available to the Firm all existing building plans and specifications needed by the Firm to create the Plan. Some plans are considered sensitive and will only be allowed to be viewed within locations controlled by the County.

The Plan is expected to include market analysis covering the period of 2017 to year 2027. To that end, the Plan should evaluate the County's leased and owned building space use and estimate the County's needs over the subject time period. Identify and evaluate the occupancy costs of County ownership as compared to the occupancy costs of leasing based on an assessment of highest and best use. Provide recommendations and an implementation plan for the County to meet its projected needs and quantify the costs of the recommendations as compared to the alternatives.

The Plan should recommend a planning and/or management structure for implementing the elements recommended in the comprehensive facilities plan. Develop a methodology for prioritizing the recommendation of the Plan using criteria that can be understood by all stakeholders including management and elected officials.

Regular on-site work time is an expectation of the Firm. The County's Plan contact personnel may meet regularly to guide the process. The Firm will recognize that entry into some of the County facilities may require background checks of the Firm's staff or team. The Firm will agree to provide the information needed to conduct such background checks.

A mutually-agreed upon set of essential planning information will be developed with the Firm at the start of the process in order to fully understand demands on County staff time at critical points in the process.

PROPOSAL SCOPE AND DELIVERABLE EXPECTATIONS

Bidding Firm should include the following items within their proposal price and/or expect to perform these tasks and functions once under contract

- a) Firms will provide a description of their methodology that will be used to produce the Plan.
- b) The Plan will reflect the County's priorities and long term directions.
- c) A reasonable and expected work schedule outline must accompany all proposals. Unless otherwise authorized, the successful bidder will be expected to begin work on the project within ten (10) business days following the execution of the contract. Contract will be deemed awarded on the date it is signed by both parties.
- d) County perceives that staffing of the Firm will be critical to the success of this work. In their proposals, Firms shall submit the name(s), qualifications, and

relevant experiences of the key personnel to be assigned to this work. By proposing specific individuals, Firms agrees to make them available for the duration of the project and to participate in development of the Plan unless County agrees to a change in personnel.

- e) If needed, a listing of all subcontractors to be engaged on the Plan shall be submitted with the proposal. That list will include any and all relevant information pertaining to the subcontractor. Racine County reserves the right to approve or reject any and all subcontractors and to make its selection of a Firm based on the indicated subcontractors.
- f) Provide description of the insurance coverage provided by the Firm and if needed that of their sub-contractors.
- g) Complete and verifiable descriptions of three (3) recent projects by the Firm which is similar in scope to this expected Plan. Descriptions of the projects should be given in detail and shall include contact names, titles, addresses, and phone numbers. The County reserves the right to contact any person the Firm has listed to discuss that person's experiences with the Firm, any staff member, or sub-contractor.
- h) Planning process will be inclusive with broad-based input from all departments and their division's key personnel. Firms will include the following facilities and all County departments / divisions within those facilities in the Plan design survey:
 - i. Racine County Courthouse (on the National Historic Register)
 - ii. Racine County Law Enforcement Center
 - iii. Racine County Dennis Kornwolf Service Center
 - iv. Racine County Ives Grove Office Complex
 - v. Racine County Sheriff's Patrol Station
 - vi. Racine County Western Racine County Service Center
 - vii. Racine Heritage Museum
 - viii. Belle Harbor Marina
 - ix. Reef Point Marina Administration Building
- i) Firms should also expect to investigate existing County vacant property and local real estate for possible purchase or expansion for potential Plan solutions or recommendations.
- j) The Plan will be developed and provide realistic possibilities for the County to follow using current locations, County owned property, and/or real estate located within Racine County and at sites that provide the best function for the County. The Plan will specifically consider County desires and local municipality rules and regulations for any areas in which the Plan lays out facility changes or construction.

- k) Future expansion assumptions will be developed for all locations and major service providing areas.
- l) If needed, the Plan shall indicate advantages or disadvantages to County facility ownership or real estate leasing options.
- m) Physical plant / building operational services conditions and building major infrastructure and building shell components assessment will be part of the Firm's survey process as to their affect, or limitations, on how any Plan recommendations would be impacted or allow / prevent space changes and budgets.
- n) The Plan shall include, but not be limited to,
 - i. Department / division survey results
 - ii. Methodology of survey
 - iii. 8 1/2" X 11" schematics of plans, site layouts, etc.
 - iv. Detailed recommendations
 - v. Pros and cons of recommendations
 - vi. Site location advantages and disadvantages
 - vii. Expected costing ranges
- o) A DRAFT copy of the Plan will be submitted to the County prior to finalizing the Plan. The County will be permitted to review the DRAFT Plan, request changes, and provide input to the final draft Plan document.
- p) The final delivered Plan will be professionally prepared, bound, easily read, and comprehensive as decided by the County. The Plan will be accompanied by a delivered electronic version on PowerPoint, or similar, that will allow the County to conduct future presentations if needed.
- q) Qualified and experienced Firms are asked to provide in their proposal a fee based on a Lump Sum for all work. Lump Sum proposal will include all anticipated travel to and from County facilities and lodging. Firms are also asked to provide a fee structure guaranteed for one year from contract execution for any additional work should the County need further services.
- r) Firm's proposal fee listing will include anticipated costs for their attendance at meetings held during normal business hours, and if needed, after-hours to make presentations related to the Plan. The Firm will also specify quantities of meetings that can be expected.
- s) Firm will provide understandable and relative budgetary estimates for all suggested work, space use ideas, building alterations, and construction.

- t) Firm's proposal will provide pricing lists for additional services such as document reproduction, image / rendering production, any other fees that will be billed separately.
- u) Provide any other relevant information that may be helpful to the County in making its decision.
- v) Additional Goals
 - i. Consolidate Racine County's real estate holdings based on "highest and best use"
 - ii. Reduce the County's overall facilities operational costs
 - iii. Reduce the number and degree of liabilities associated with the County's ownership of its facilities. This not only includes safety but environmental/sustainability considerations.
 - iv. Optimizing use of buildings and identifying acquisition/expansion needs.
 - v. Eliminating/reducing capital spending on obsolete buildings.
 - vi. Enhancing interface between staff and customers.

INSTRUCTIONS, FORMS, TERMS AND CONDITIONS

1. The sole point of contact for questions during the RFP process will be:

Karl Jeske
Racine County
Buildings & Facilities Management Division
Racine WI 53403
262.636.3280
karl.jeske@racinecounty.com

Bidding Firms can arrange site visits by making direct contact. Any questions the Firm may have related to creating their RFP response or clarifications the Firm may need shall be directed in writing only to this person

2. The RFP response deliverable Plan must be sealed, addressed to, and be delivered directly to location found on the RFP Form.
3. Delivery or mailing envelope / box shall be plainly and accurately marked to guarantee prompt delivery.
4. Any proposal received by the County that is not clearly marked as specified may result in the proposal being rejected with or without review.
5. Firms will provide six (6) hard copies of the Plan and six (6) electronic disk copies of the Plan. Firms will investigate prior to delivery what existing County software is

available to read the Firm's delivered Plan to insure for the County's viewing without additional purchases.

6. The proposal must be signed by the person or persons authorized to legally bind the Firm or it will not be considered.
7. Deadline for submission of the proposal is 1:30 p.m. CST Friday April 14, 2017.
8. All proposals shall be opened publicly, however, only the names of the Firms submitting proposals will be read aloud. No selection of a final Firm will be made at that time.
9. This RFP may be amended by the County in response to the need for additional clarification of intent, requirements, or bidding dates. Copies of the amendment will be sent to the prospective bidding Firms to the person listed on the proposal form. Bidding Firms shall indicate on the proposal form their receipt of any amendment(s).
10. Any question or need for clarification required to produce a qualified and accurate proposal shall be submitted in writing to the County's sole contact person in writing NO LESS THAN ten (10) business days prior to the proposal opening date.
11. County shall not be responsible for any costs associated with preparing proposals in response to the RFP.

SELECTION PROCEDURES

Proposals will be reviewed by a selection committee comprised of County staff who will recommend a list of three firms, considered to be the most qualified and best suited to provide the required services, to be interviewed by the committee, if necessary. Upon completion of the interviews, the selection committee will recommend the firm ranked as the most qualified.

County reserves the right to reject any and all proposals and for any reason deemed necessary by the County to choose a proposal that is in the best interest of the County. County shall not base its decision solely on cost but shall consider experience, qualifications, availability, and other relevant information of the bidder required to perform the work and meet the intended outcome for the County.

RACINE COUNTY RFP FORM

Provide this completed form with your submitted RFP documents.

Facility and Space Use Survey & Strategic Master Plan Project Number: RC17-5001

Proposal Submittal Due: FRIDAY APRIL 14, 2017 1:30 p.m. CST

Submit Proposal to: KARL JESKE
RACINE COUNTY
BUILDINGS & FACILITIES MANAGEMENT DIVISION
730 WISCONSIN AVENUE
RACINE WI 53403

**PROPOSAL: RACINE COUNTY FACILITY AND SPACE
USE SURVEY & STRATEGIC MASTER PLAN
Project Number: RC17-5001**

Addendum Receipt: We acknowledge the receipt of Addenda ____ to ____ inclusive.

The undersigned bidder, duly sworn, is an authorized representative of the firm named below; and affirms that the bidder has carefully prepared the proposal; and that the bidder or agents, officer, or employees have not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in connection with this proposal.

Name of Firm

Street

City, State, Zip

Telephone

e-Mail Address

Sole Trade Partnership Joint Venture Corporation

Signature of Bidder _____ **Date** _____.

Print or Type Name of Bidder _____.

Bidder Title _____.

EXHIBIT A

STANDARD TERMS AND CONDITIONS FOR PROFESSIONAL SERVICES

These terms and conditions shall be incorporated into and made a part of all Professional Service contracts entered into between Racine County (hereinafter "COUNTY") located at 730 Wisconsin Avenue Racine Wisconsin 53403 and the contracted service provider FUTURE FIRM NAME ADDRESS and if applicable their sub-contractors (hereinafter "FUTURE FIRM NAME") hereby agree that the following terms and conditions shall be incorporated into and supersede any conflicting terms in any Service Agreement, Contract and/or Purchase Orders. This Exhibit shall remain in effect throughout the term of the Service Agreement unless either party terminates the Service Agreement by giving prior written notice to the other party.

1. **PERFORMANCE:** FUTURE FIRM NAME shall perform all services as set-forth in the attached Request For Proposal for Facility and Space Use Survey and Strategic Master Plan. Agreement extends to any additional work request and contracted for by the COUNTY and FUTURE FIRM.
2. **INTELLECTUAL PROPERTY:** Any documents or work product produced by FUTURE FIRM NAME pursuant to this contract shall become the property of the COUNTY and shall be under the control of the COUNTY and FUTURE FIRM NAME shall be allowed to retain copies of said documents and work product.
3. **OWNERSHIP RIGHTS:** Any of the COUNTY's documents which are provided to FUTURE FIRM NAME to assist FUTURE FIRM NAME in the performance of his or her work shall be returned to the COUNTY upon demand of the COUNTY or at the conclusion of the project, whichever comes first. COUNTY agrees to indemnify and hold FUTURE FIRM NAME harmless from any damage, liability, or cost including reasonable attorney's fees and costs of defense, arising from any changes made by anyone other than FUTURE FIRM NAME or from any reuse of the drawings and data without the prior written consent of FUTURE FIRM NAME.
4. **ASSIGNMENT:** FUTURE FIRM NAME shall not assign, sublet, subcontract or transfer any of the services or interest under the contract without the prior written consent of the COUNTY.
5. **EQUAL OPPORTUNITY:** In connection with the performance of services under this contract, FUTURE FIRM NAME agrees not to discriminate against any employee, applicant for employment or person receiving services from FUTURE FIRM NAME pursuant to this contract because of age, race, religion, color, handicap, sex, physical condition, developmental disability, sexual orientation, natural origin as those terms are described in state and federal law.
6. **STATUTORY COMPLIANCE:** FUTURE FIRM NAME shall comply with all federal, state, local laws and regulations and requirements.

7. **INDEMNIFICATION:** To the extent of FUTURE FIRM NAME casually professional negligent acts, FUTURE FIRM NAME shall indemnify, hold harmless, the COUNTY and its officers, agents and employees from any and all claims, damages to person or property, lawsuits or liability (including but not limited to reasonable fees and charges of FUTURE FIRM NAME architects, attorneys, and other professionals, and reasonable court costs) resulting from the professional negligent acts, errors or omissions of FUTURE FIRM NAME or any of FUTURE FIRM NAME agents or employees in the performance of services under this contract within the limits of insurance carried by FUTURE FIRM NAME to the fullest extent permitted by law, the COUNTY shall indemnify and hold FUTURE FIRM NAME and its officers, agents and employees from any and all claims, damages to person or property, lawsuits or liability (including but not limited to reasonable fees and charges of FUTURE FIRM NAME, architects, attorneys, and other professionals, and reasonable court costs) resulting from the negligent acts, errors or omissions of Racine COUNTY or any of the COUNTY's agents, or employees in the performance of services under this contract.
8. **CHOICE OF LAWS:** The laws of the State of Wisconsin shall govern this contract, the construction, interpretation and determination of the rights and duties of the parties under this contract.
9. **INDEPENDENT CONTRACTOR:** FUTURE FIRM NAME shall be considered an independent contractor and not an employee of the COUNTY. The COUNTY agrees that FUTURE FIRM NAME shall have sole control of the method, hours, work and time and manner of performance of this contract unless specifically stated. The COUNTY takes no responsibility for the selection, dismissal, supervision, direction or performance of FUTURE FIRM NAME employees. Nothing contained in this contract shall create a contractual relationship with or cause of action in favor of a third party against either the COUNTY or FUTURE FIRM NAME. FUTURE FIRM NAME services under this contract are being performed solely for the COUNTY's benefit, and no other entity shall have any claim against FUTURE FIRM NAME because of this contract or the performance or nonperformance of services provided hereunder.
10. **TERMINATION:** Either party may at any time, upon a thirty day (30) written day notice to the other party, terminate this contract. The COUNTY shall pay for any and all work performed up to the termination date. The COUNTY shall not pay any termination expenses or costs if the contract is terminated regardless of the reason for termination.
11. **INSURANCE:** FUTURE FIRM NAME will maintain insurance coverage for Workers' Compensation, General Liability, and Automobile Liability and will provide certificates of insurance to the COUNTY upon request. FUTURE FIRM NAME will provide to the COUNTY a certificate of insurance annually and shall name Racine COUNTY as additionally insured.
12. **ACCESS:** The COUNTY shall arrange for safe access to and make all provisions for FUTURE FIRM NAME and FUTURE FIRM NAME agents and employees to enter upon

public and private property as required for FUTURE FIRM NAME to perform services under this contract.

13. **SCHEDULE:** FUTURE FIRM NAME will provide to the COUNTY an annual service schedule of all equipment and complete all service within the month it is scheduled and is hereby incorporated into the contract. If unable to perform FUTURE FIRM NAME will notify COUNTY representative, in writing and/or by fax, email or phone prior to the scheduled work date explaining, in detail, reasons for non-compliance or delay.
14. **COMPLETENESS OF DOCUMENTS:** Services provided by FUTURE FIRM NAME under this agreement will be performed in a manner consistent with the degree of care and skill ordinarily exercised by members of the same profession currently practicing under similar circumstances. Racine COUNTY will not be expected to appraise, or be held responsible for, completeness or detailed review and deficiencies in the work completed by FUTURE FIRM NAME.
15. **LIMIT OF LIABILITY:** FUTURE FIRM NAME liability shall not exceed the limits of insurance carried by FUTURE FIRM NAME.
16. **LENGTH OF AGREEMENT:** The initial term of this agreement shall end when the deliverable documents of the Plan are accepted by the COUNTY. At the sole option of the COUNTY, the COUNTY may extend FUTURE FIRM NAME contract for services on pricing as outlined in the Request for Proposal and/or agreement.

Racine COUNTY expressly rejects any of the following terms and conditions in its contracts for Professional Service Agreements:

1. **ARBITRATION:** There shall be no binding arbitration provisions in any contract between the COUNTY and FUTURE FIRM NAME.
2. **LIMIT OF LIABILITY:** There shall be no limit on FUTURE FIRM NAME liability as part of the contract between the COUNTY and FUTURE FIRM NAME.
3. **ATTORNEY'S COSTS/FEES:** There shall be no provisions mandating the payment of the either of other party's attorney's fees which are the result of litigation arising out of contract disputes.

ENTIRE AGREEMENT: THIS AGREEMENT CONSTITUTES THE ENTIRE UNDERSTANDING BETWEEN FUTURE FIRM NAME AND THE COUNTY. ANY AMENDMENTS TO THIS AGREEMENT SHALL BE IN WRITING AND EXECUTED BY BOTH PARTIES.

END OF DOCUMENT

INITIALS: _____

