



REQUEST FOR PROPOSALS

2024 Comprehensive Housing Study and Action Plan

City of Plymouth, Wisconsin

Issued: April 15, 2024

Proposals Due: May 17, 2024 by 4:00PM CT

A. SUMMARY

The City of Plymouth seeks proposals from qualified planning individuals or project teams to prepare a comprehensive housing study and action plan to help elected officials, City staff, stakeholders, and community members develop a meaningful sense of the housing market, as well as an understanding of key housing issues, and how they affect the City of Plymouth. The study and action plan are intended to offer community leaders and stakeholders a basis for formulating community-specific housing priorities, policy alternatives and intervention strategies, including land use and zoning decisions. The study should help guide decisions related to the allocation of public funds and other resources.

The process must include updated background information and demographics from the 2020 census information. Furthermore, the Plan should be streamlined to a public-friendly and usable document. To that end, the format of the document should be modernized and formatted to utilize modern tables and graphics to the greatest extent possible.

Both the housing study and action plan shall be referenced collectively as “Plans” throughout this RFP.

B. COMMUNITY OVERVIEW

The 8,909 people, who call the City of Plymouth, Wisconsin home, know that the community provides a high quality of life in Sheboygan County. The city has an excellent school district, a busy commercial corridor, several large manufactures, and safe neighborhoods served by ample parks and natural areas have resulted in considerable loyalty and community pride among residents.

The beautiful Mullet River and Mill Pond Dam is the focal point of the community that splits Eastern Ave from Mill Street. Whether you are on the east side or west side, historic buildings thoughtfully blend with new redevelopment to provide a mix of housing, employment, shopping, dining, and entertainment.

C. SCOPE OF WORK

The City of Plymouth anticipates a scope like the following. These are general requirements for the planning process and are not intended to be a comprehensive list of tasks and deliverables. It is expected that project teams will provide the City with more specific recommendations for approaches, tasks, and deliverables based on their expertise from past work on housing study and action plan projects.

Required Elements:

- a. Demographic review and projections
 - The City’s 2022-2024 Comprehensive Plan will be a good base for this information.
 - Analysis and interviews with large local employers to determine the type of positions currently open/available and to be created in the next 5-years that will drive housing need.
- b. Inventory of existing housing stock.
- c. Housing needs analysis and prioritization.
 - Identify areas suitable for future housing developments.
 - Propose corresponding zoning designations for optimal land use.
 - Identify necessary infrastructure upgrades for potential future housing developments. Integrate identified upgrades into the overall plan.
 - Note: Kapur and Associates is in the process of finalizing a study to provide costs of waste water infrastructure for several potential development areas.
- d. Project Recommendations:
 - Zoning Ordinance Revisions.
 - Comprehensive Plan Revisions.
 - Housing Assistance Programs.

- Housing Related Investments.
 - Marketing Efforts
- e. Comparative analysis of the cost of development in Plymouth vs our neighboring communities.
 - f. Case studies and examples of innovative housing programs in similarly situated communities.

Specific Project Focuses:

- a. Help the city identify concepts for creative, realistic, and impactful housing projects
- b. Develop Utilization Plan/Program of options based on TID#4 extension for affordable housing, additional funding commitments, and/or donations. ~\$2.3 million will be generated from the Tax Increment District (TID) for housing development.
 - -75% is required to be used affordable for housing ~\$1.75 million.
 - -25% for general housing development ~525,000
 - Develop Guidelines for Incentives For Developers
- c. Include exploration of a model similar to the Forward Fund or integration with the Forward Fund, private philanthropy models, community development, financial institutions, use of bonds, and low-interest loan options.
- d. Identify other communities that are doing well in similar endeavors and creating meaningful impacts.

General Questions that the Plans should Answer:

- a. Building off the data in the housing chapter of the 2022 Comprehensive Plan Update, how will future economic, employment, and population growth impact housing demand, especially when it comes to sensitive populations and workforce housing needs?
- b. Based on market information, what are the current, 5-year, and 10-year housing needs in our City? Where do gaps exist in terms of housing types and price ranges? Where should the needed housing types be located?
- c. Does the City have the right balance between owner-occupied and rental housing? What strategies are needed to improve the balance?
- d. What are the City's strategic options for promoting and attracting market rate developers and affordable housing developments, especially those willing to build speculative homes?
- e. What are the housing demand shortfalls?
- f. How are workforce and aging population housing needs impacted by price and community livability? What steps are needed to remedy that?
- g. What strategies and programs does the City need to provide for the development and redevelopment of needed housing within the community? How should the community maximize the use of limited public funds to support the potential housing market?
- h. How can community partners (e.g., major employers, school district) support the City as the community of choice, and the preferred location for employees to live? How can community partners support the development of quality housing or rehabilitation of existing housing?
- i. Does the Zoning Ordinance allow for the recommended strategies? If not, what needs to change?
 - Provide Sample Codes from other Municipalities
 - Are there ways to encourage development or drive down development costs with zoning code changes.

Document design features:

- a. The Housing Study and Action Plan needs to be easy to navigate and translate by City Staff and the public.
- b. Text that is supported and enhanced with charts, graphics, images, and photos is needed. A graphic rich document is of utmost importance.

- c. A clear, concise, and well-defined document layout is desired.

Project process and Support Information:

- a. Project Management: Project Management includes effective coordination with staff, representative committees, and the Common Council. Consultant shall conduct an initial project management team meeting with City Staff and prepare a project process roadmap that that will guide the project management team and lists the project phases, schedule of events/activities, and products on a timeline and assigns roles and responsibilities for each task. Project management tasks shall include at a minimum the following:
 - Conduct an initial project management team meeting to create a shared understanding of the project purpose, process, and schedule between the project team and City Staff.
 - Conduct an initial stakeholder analysis by identifying key stakeholders, their issues, levels of involvement, and strategies for outreach.
 - Prepare the necessary draft project management materials.
- a) Assessment: Assessment includes conducting an initial review of the existing community planning reports and studies. Links to the City website for documents and GIS are provided in the below list of plans and ordinances:
 - [Zoning Ordinance](#)
 - [2022 Comprehensive Plan](#)
- a. Public Engagement: The City of Plymouth values the participation of citizens in every stage of the decision-making process. Participation of citizens, landowners, business owners, appointed and elected officials, and other stakeholders throughout the community is paramount to the success of the Housing Study and Action Plan; therefore, the City will look for a project team that has facilitation skills.
- b. Staff Support: The City has several staff members with significant experience in public engagement and expects to participate in the engagement process. The selected project team will be responsible for working with City Staff to prepare the framework for the most impactful ways to obtain public participation. The project team will be responsible for organizing and then co-leading public events with City Staff.

D. DELIVERABLES

All items delivered as part of this project shall be the sole property of the City of Plymouth. The consultant shall be responsible for the submittal and execution of the following:

- a. Progress Reports and Research: The consultant shall be responsible for submitting monthly progress reports and research information relative to the project. The consultant shall clearly communicate how the document may differ from Wisconsin regulations, Zoning Ordinance regulations, and other County and City documents.
- b. Draft Document and Maps: Copies of the draft documents are required during the development stages of the project for review, presentation, and use by the Ad-Hoc Housing Committee and City Staff.
- c. Meetings: The consultant will be responsible for meeting with City Staff, Ad-Hoc Housing Committee, and Common Council for document reviews and approvals. The consultant will also meet with City Staff as the project develops on a regular basis. The number and frequency of the meetings will be determined in consultation with all parties before the project begins. The purpose of the meetings will be to establish objectives, discuss alternatives, provide direction, and review progress.
 - The City Plan Commission should be brought into the loop during discussion of zoning

code and comprehensive plan suggestions throughout the process and not all at once at the end.

- d. **Final Work Products:** The final Comprehensive Housing Study and Action Plan must be provided in both print and electronic format compatible with the City website. Easy-to-use and editable charts, checklists, graphics, and images/photos within the document are required. The consultant shall provide the following specific products:
- One (1) electronic Microsoft Word version and PDF version of the document, in a format that can be edited by the City Staff.
 - A copy of the map data that is compatible with the City's GIS System, in a format that can be edited by the City Staff. (if needed)
 - A digital version/shape files of maps with the individual parcel level for use in and compatible with the City's Geographic Information System, which uses ESRI platform and can be edited by the City Staff. (if needed)

E. SUBMITTAL QUESTIONS

All questions shall be submitted in written form to the contact information provided in Section E by Friday, May 3 2024. Answers will be provided via the City website as a part of addenda to the RFP as they become available. Multiple addenda may be released.

F. SUBMISSION REQUIREMENTS

Respondent shall submit one (1) complete original hard copy proposals and one (1) electronic copy in PDF format on USB Flash Drive of the entire proposal in a sealed package with the project name, "Plymouth 2024 Comprehensive Housing Study and Action Plan" marked on the front of the package. To be considered, proposals must be received no later than 4:00 PM, Central Time, May 17, 2024, and delivered to:

Tim Blakeslee- City Administrator/Utilities Manager
City of Plymouth, WI
Office: 920-893-3745
City Hall: 128 Smith St, Plymouth, WI 53073 (If mailed P.O. Box 107)

Proposals received after the deadline will not be accepted. Faxed or emailed proposals will not be accepted. Postmarks before the deadline are not sufficient for acceptance. The City will not be responsible for any errors or omissions in the proposals or any delivery delays.

Proposals should include the following information, presented in a clear, comprehensive, and concise manner, to illustrate the project teams' capabilities and technical approach to the work. Each proposal must include the following information, in order as shown below:

- a. **Title Page and/or Cover Letter.** Show the proposal title, the name of the organization, address, telephone number(s), email address, name of the primary contact person, the date, and other relevant company information. Provide the name(s) of the person(s) authorized to make representations for your team, their title(s), address, email address, and telephone number(s). Include a list of contact information for any proposed sub-consultants and the work they will perform.
- b. **Statement of Qualifications.** Brief introduction of the Project Team organization. Summary of your understanding of the project and why your team is best suited to complete the scope of work.
- c. **Key Staff.** Identify the designated project manager or primary contact and key supporting staff. Include resumes for each of the individuals and identify any sub-consultants.
- d. **Experience and Examples.** Describe your team's experience in the required areas of expertise, and its ability to provide the needed services for the City. Include at least three examples in the last five years. List a minimum of three references related to similar work; references matching the three examples are

preferred but not required. The focus of provided examples should be on work performed by the key staff members involved in the project.

- e. Scope and Approach. State the services your team is proposing to provide. Describe the process and timeline that would be utilized to complete the project.
- f. Schedule. Illustrate the Scope and Approach including a breakdown of tasks, timeline, meetings, deliverables, and task responsibility.
- g. Cost. Provide a fee to complete the project.

Failure to complete the above documentation may be grounds to declare an RFP non-responsive and the City may reject the statement of qualifications in whole or in part.

G. EVALUATION CRITERIA

Proposals will be evaluated based on the overall approach, team experience and qualifications, budget, organizational structure, methodology, schedule and fit with the City of Plymouth. Proposals will be evaluated according to the following:

- a. Project approach and scope. (20 points).
- b. Qualifications of the project team and individual members. Particular attention will be given to the experience and the demonstrated ability of the project manager to complete all project tasks. (20 points).
- c. Project Team experience and examples (20 points).
- d. Understanding of required project work. (20 points).
- e. Project cost. (15 points).
- f. Quality of the proposal design. (5 points)

H. SELECTION PROCESS

The Project Team selection process will involve the following primary steps.

- a. Proposal Review. The proposal review will be based on a comparative assessment and scoring of each document in accordance with the Evaluation Criteria. The City will then select one or more finalist Project Teams to advance in the selection process. During the evaluation process, the City reserves the right, where it may serve the City's best interest, to request additional information or clarification from proposing teams, or to allow corrections of errors or omissions. The City reserves the right to verify any information contained in proposals.
- b. Interviews. The City will determine whether interviews are needed, or it may select based on the proposals alone. If determined necessary by the City, the finalist teams will be requested to present their experience, proposed approaches, and personnel in an interview to members of the City's selection team and/or City Council. (Further interview instructions will be provided to the selected finalist team(s).) The City will then review the presentation(s) and select a team to advance in the process.
- c. Steering Committee and Plan Commission Review. Based on the results of the selection process, the City's selection team will recommend to the Ad-Housing Committee and the Common Council for approval. The final contract must also be approved by the Common Council.
- d. Award of Contract. The City will enter negotiations with a team based on the City's selection team recommendations. Negotiations will be conducted beginning with the team ranked first. If a contract that is satisfactory and advantageous to the City can be negotiated at a price considered fair and reasonable, the award will be made to that team. Otherwise, negotiations with the team ranked first will be formally terminated and negotiations conducted with the team ranked second, and so on until a contract can be negotiated at a fair and reasonable price. The City reserves the right to reject any and all proposals

submitted.

I. BUDGET

Proposals should provide a work plan that best meets the above objectives and scope including all travel and incurred costs. The proposal should also illustrate additional items that could be out of budget but feel would be a benefit to the project. Funding for the project will be provided by the 2024 TID#4 closure.

J. TENTATIVE TIMELINE

RFP Distribution:	April 15, 2024
Questions Due:	May 3, 2024
Submittal Deadline (4:00 PM CT):	May 17, 2024
City Review of Responses:	Week of May 20 2024
Interviews (if necessary):	Late-May 2024
Consultant Completes Project:	October 2024

K. MISCELLANEOUS AND GENERAL PROVISIONS

- a. Non-Discrimination Statement: The City of Plymouth does not discriminate based on race, color, religion, age, marital or veterans' status, sex, national origin, disability, or any other legally protected status in the admission or access to, or treatment or employment in, its services, programs, or activities.
- b. Rejection of Proposals: The City reserves the right to reject any or all proposals, to divide responsibilities among one or more applicants or firms, to waive formalities, and to select the individual or firm which, in the City's sole judgment, can best perform the scope of services required.
- c. Withdrawal of Proposals: the proposer upon submission of a written request may withdraw Proposals.
- d. Ownership of all data, material, and documentation originated and prepared for the City pursuant to the RFP shall belong to the City and be subject to public inspection in accordance with the Freedom of Information Act (FOIA). Trade secrets or proprietary information submitted by the Project Team shall not be subject to public disclosure under (FOIA) unless otherwise required by law or a court.
- e. The City is not liable for any costs incurred by any Project Team in connection with this RFP or any response by any Project Team to this RFP. The expenses incurred by a Project Team in the preparation, submission, and presentation of the proposal are the sole responsibility of the Project Team and may not be charged to the City, regardless of whether a Project Team's Proposal is ultimately selected by the City for completion of the work detailed in this RFP.
- f. Each Project Team should carefully read and review all such items and should address such items in its proposal. However, the final description of the services and/or specifications to be provided to the City under this RFP is subject to negotiations with the successful Project Team, and final approval of the City.
- g. The Project Team shall maintain, during the life of the Agreement, public liability, and property damage insurance to cover claims for injuries, including accidental death, as well as from claims for property damages that may arise from the performance of work under the Agreement.