

City of Madison

Community Development Division

215 Martin Luther King Jr. Blvd.,
Third Floor
Madison, WI 53703-3346



REQUEST FOR PROPOSALS

RFP #8836-2019

Seeking Collaboration of Service Providers for Tree Lane Apartments

Release Date: May 16, 2019
Due Date: Friday, June 7, 2019
at 12:00 p.m., NOON

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RFP SUMMARY

RFP NUMBER	RFP # 8836-2019												
RFP TITLE	Tree Lane Apartments Service Providers												
DEADLINE FOR SUBMISSIONS	12:00 P.M. (NOON) CST, Friday June 7, 2019 Proposals received after the deadline will not be considered.												
SCOPE	Through this RFP process, the CDD seeks to identify a collaboration of supportive service providers that would partner with Heartland Housing, and provide supportive services for Tree Lane Apartments.												
Application Form and Guidelines	Available at: Community Development Division Funding Opportunities Website												
E-MAIL PROPOSAL TO:	CDDapplications@cityofmadison.com All proposals must be submitted electronically on the forms provided . Please put Tree Lane Services 2019 in email subject line.												
DIRECT ALL INQUIRIES TO:	Linette Rhodes, Interim Community Development Grants Supervisor lrhodes@cityofmadison.com or (608) 266-6520												
RFP CALENDAR	<p>Please Note: These dates are for planning purposes. They represent the City's desired timeline for implementing this project. Any revision to the Due Date for submission of proposals will be made by addendum. All other dates may be adjusted without notice, as needs and circumstances dictate.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Date</th> <th style="text-align: left;">RFP Activity</th> </tr> </thead> <tbody> <tr> <td>May 16, 2019</td> <td>Release of RFP</td> </tr> <tr> <td>12:00 p.m. (CST) June 7, 2019</td> <td>DEADLINE FOR SUBMISSION OF PROPOSALS</td> </tr> <tr> <td>Week of June 17th</td> <td>Applicant Presentations</td> </tr> <tr> <td>July 16, 2019</td> <td>Common Council Approval</td> </tr> <tr> <td>August 1, 2019</td> <td>Anticipated contract start date</td> </tr> </tbody> </table>	Date	RFP Activity	May 16, 2019	Release of RFP	12:00 p.m. (CST) June 7, 2019	DEADLINE FOR SUBMISSION OF PROPOSALS	Week of June 17th	Applicant Presentations	July 16, 2019	Common Council Approval	August 1, 2019	Anticipated contract start date
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SECTION 1: INTRODUCTION

Background and Purpose

Tree Lane Apartments is a 45-unit permanent supportive housing apartment building located at 7933 Tree Lane. The property includes a mix of 2, 3, and 4 bedroom apartments. Development of this property was undertaken at the City of Madison's request and is part of the City's effort to create 250 units of permanent supportive housing for people experiencing homelessness. Heartland Housing was chosen as a developer and property manager of this property through a competitive RFQ process in 2015. Heartland completed the construction and opened its doors to 45 families in June 2018.

In order to provide on-site supportive services, Heartland originally partnered with YWCA Madison. In March 2019, Heartland Housing and YWCA Madison mutually agreed to terminate YWCA Madison's ongoing services. The City's Community Development Division (CDD) staff worked with representatives from Heartland Housing and YWCA Madison to identify the supportive services deemed to be of highest priority to families at Tree Lane Apartments, and reached out to organizations with recognized experience serving disadvantaged or homeless populations, or that work in the vicinity of Tree Lane Apartments, to determine their interest in and capacity to serve Tree Lane Apartment families, with the goal of ensuring that adequate, accessible services would be available upon YWCA Madison's departure.

In response to these efforts, several organizations indicated their willingness to be part of a collaborative effort to serve Tree Lane families and their children on an interim basis until such time as the Community Development Division could complete a request for proposals process to secure longer-term arrangements. The Madison Common Council authorized a temporary sole source contract with The Road Home Dane County which responded to a request from the City to deploy staff to provide case management and supportive services at Tree Lane Apartments for up to six months or until the City identifies a longer-term vendor.

Through this RFP process, the CDD seeks to identify a collaboration of supportive service providers that would partner with Heartland Housing, and provide supportive services for Tree Lane Apartments.

Target Population

Supportive services providers are expected to engage all 45 tenant families and provide appropriate level of services with tenant's consent.

40 of the 45 units are designated for families experiencing homelessness, with priority given to chronically homeless families. Project-based Section 8 vouchers are assigned to these 40 units, requiring the tenants to pay only 30% of their income as rent. Potential tenants of these 40 units are identified using Dane County CoC's Coordinated Entry Housing Priority List. Heartland Housing, as the property management entity, conducts an initial screening based on a tenant selection plan approved by the City. Tenants must

also be approved by the housing authority that provides the Section 8 voucher (Dane County Housing Authority provides 20 vouchers and the City's Community Development Authority provides 20 vouchers). The remaining five units are affordable housing units not designated for families experiencing homelessness. They are filled through a separate process in accordance with Heartland Housing's tenant selection plan.

Currently 43 families reside at Tree Lane Apartments, including 52 adults and about 100 children. Approximately 30 children are under age 5; 45 children are between ages 5-12; and 25 children are between ages 13-17. 81% are black; 12% are white; 3% are American Indian; and 4% are multiracial.

Funds Available

When Tree Lane Apartments opened in June 2018, YWCA had \$166,000 in annual commitments for support services funds (comprised of \$91,000 from Heartland Housing's property budget, \$50,000 from the City's homeless services funds and \$25,000 from the United Way) and hoped to raise more from other sources. On February 26, 2019, the City's Common Council adopted an amendment to the CDD Operating Budget to increase funding for supportive services at Tree Lane Apartments. This included funding allocations for both onsite services, provided by The Road Home, and to expand out-of-school time (summer and after school) programming through programs connected to John Muir Elementary and Jefferson Middle School. The Council authorized temporary contracts with the Lussier Community Education Center and Wisconsin Youth Company-Elver Park Neighborhood Center for expanded youth programming. Funding for the expansion of youth services is not included in this RFP.

In consultation with service providers about the appropriate level of staffing and funding necessary to support successful partnerships, CDD staff has estimated a budget for support services at Tree Lane Apartments, for up to six months of services in 2019, at \$215,525 – all sources. This budget assumes the new service provider would begin hiring staff in July 2019. It further assumes there would be a period of about one month in which both the new service provider and the interim provider would be on site. The funding to cover this estimated budget for the balance of 2019 would be derived from resources already committed from Heartland, United Way of Dane County, and the City. (The budget estimate for the balance of 2019 (all funds) includes approximately \$117,525 for case management services, \$68,000 to support partner collaboration and \$30,000 for other operating/resident resource needs.)

The projected annual budget for support services in 2020 (all sources) is estimated budget at \$451,000. Again, this budget is expected to be supported through a funding partnership comprised of \$91,000 from Heartland Housing, \$75,000 from the United Way and up to \$285,000 from City homeless service funds. (The estimates include approximately \$286,000 for case management services, \$105,000 for partner collaboration and \$60,000 for other operating/resident resources.)

Note: The City expects organizations seeking selection as the lead case management provider in the City's RFP process to also complete a proposal for funds from United Way of Dane County. The case management program chosen through the City process will be invited by United Way to submit a proposal. The Road Home has taken steps, as part of the United Way's pre-proposal process, to reserve the ability for a new provider to submit such an application. Questions about United Way's funding process for this

project should be directed to Angela Jones, Director of Community Impact at United Way, angela.jones@uwdc.org or 246-4376

It is the City's intention that its funding will provide resources needed to cover expenses supportive services for which other resources are unavailable or insufficient. The City expects that applicant agencies will attempt to leverage other funding sources, to the extent possible, including Medical Assistance reimbursement. The City will review annual budgets and revenues, with the selected provider, and reserves the right to reduce its contribution to reflect the availability of other funding sources in order to support other homeless services in the community.

2019 contract start date for this project is likely to be after July 2019. Accordingly, applicants should submit two separate budgets— one that covers the approximately six months of 2019 and a second that presents an annual budget for the full year in 2020. 2019 funds are available only for expenses incurred between the contract start date and December 31, 2019. It is expected that organizations and services selected through this process will continue to receive city funding through 2020. The availability of funding in 2020 is contingent upon its inclusion in the City's 2020 Adopted Operating Budget. Finally, any funds authorized for these services beyond 2020 will be included in a broader RFP process for Homeless Services to be conducted in 2020. The level of services needed for this project will be re-evaluated at that time.

SECTION 2: SCOPE OF WORK

Proposed Staffing Model

CDD and Heartland Housing have met with various stakeholders and developed the following supportive services staffing model for the residents at Tree Lane Apartments. Applicant agencies should consider the proposed staffing structure when completing their proposals. Applicant agencies may propose alternate staffing structures, but should provide details in their applications.

The operating presumption of this RFP process is that a single agency will not be able to provide all of the proposed staffing. The primary goal of the RFP is to seek an organization that will function as the lead provider of on-site case management services at Tree Lane Apartments and assemble a team of collaborative partners to provide supplemental services or programming. The following positions and functions are considered high priorities and will need to be addressed in a successful proposal:

- **One Full-time Supervisor/Lead Case Manager:** This position will be responsible for service coordination with all providers and direct oversight of on-site case managers. The position will ensure there is a collaborative management model between service providers and property management focused on maintaining tenants' housing and creating a positive living environment. This position must be employed by the lead applicant.
- **Two Full-time Case Managers:** These positions will provide case management services to tenants. Services will include developing individualized service plans focusing on maintenance of permanent housing, and connection to medical, behavioral health, and any other appropriate community resources. These positions will also provide up to two months of follow-up case

management services to tenants who move out of Tree Lane without supportive services. All this work is predicated on support to tenants based on housing first and harm reduction strategies. These positions must be employed by the lead applicant.

- **Youth Coordinator:** This position will be responsible for linking youth residing at Tree Lane Apartments with appropriate and available programming opportunities. The position will also serve as the primary liaison between families at the property and community partners including, MMSD, community centers and other partners involved in providing experiences intended to promote positive youth development.
- **Mental Health Services:** This position/partnership will provide a full range of on and/or off-site, trauma-informed mental and behavior health services and therapies in individual, family or group settings.

Community Partnerships

Depending on capacity and service delivery design, the lead agency may propose collaborative partnerships with other community organizations for additional or specialized supportive services. The purpose of these relationships should be to enhance or expand the services provided to client families beyond what is available through the lead agency. They should be focused on improving client outcomes and reflect mutual programmatic goals.

The partnership will need to establish clear referral strategies, processes, and protocols, including follow-up processes. Data-sharing agreements—and actual data sharing—should also be evident as they are vital to understanding the effectiveness of partnership, and are necessary for both accountability and sustainability. Regular reporting of outcomes and meetings with both partners and referral sources are the keys to maintaining fidelity and making corrections.

Given the complexities that are likely to arise from multiple funding streams, the City intends to contract directly only with the lead applicant. The lead applicant will be responsible for identifying proposed community partnerships and for detailing performance and financial arrangements by creating Memorandum of Understanding (MOU) with those partnerships. The MOU should outline services, performance measures, reporting and funding availability.

In considering potential community partnerships, lead agency applicants should focus on those likely to contribute to the long-term success of Tree Lane residents. These might include partnerships that address issues related to such things as wellness and health care, leadership development, positive youth development, early childhood home visiting services, financial literacy, parenting skills, employment opportunities, conflict resolution, or access to food, clothing or financial assistance. Strong partnerships will also be able to demonstrate cultural competence and/or employ staff with lived experience.

Supportive Housing Indicators of Success

Successful supportive housing will demonstrate strong performance in the following areas. Specific performance measures and targets (e.g. 90% retention rate of or exit to permanent housing) will be set through contract negotiation. Agencies will be expected to engage in continuous quality improvement efforts in order to improve outcomes in these areas.

- **Tenants stay housed.** Supportive services will help break a cycle of housing instability for tenants and ensure they remain in permanent housing.
- **Tenants improve their physical and mental health.** Supportive services will help tenants to access needed physical and mental health care and improve their health.
- **Tenants maintain or increase their income.** Supportive services will help tenants increase their income by obtaining public benefits to which they are entitled and/or employment. If tenants are already receiving all benefits for which they are eligible, supportive services will help maintain their income.
- **Tenants are satisfied with the services.** Tenants will express satisfaction with the supportive service providers, both case management and referral services. Tenant satisfaction is an important outcome that ultimately affects the quality of life for tenants and the ability of supportive housing projects to help tenants achieve housing stability.
- **Tenants have social and community connections.** Supportive services will help tenants develop and sustain connections to their community, and build social support networks.

Requirements and Eligibility

The City is interested in identifying a lead service provider to provide supportive services to families residing at Tree Lane Apartments. Organizational eligibility is limited to non-profit organizations and agencies that have obtained tax exempt status under 26 USC §501(c)(3). A strong lead applicant will have experience in the following areas:

- **Participation in Dane County's Coordinated Entry System**
Coordinated Entry (CE) is a system designed to ensure that all people experiencing a housing crisis have fair and equal access to housing assistance, and are quickly identified, assessed for, and connected to housing and homeless assistance based on their strengths and needs. It uses standardized tools and practices, incorporates a system-wide housing first approach, and coordinates assistance so that priority is given to households with the most significant service needs. This approach has been adopted locally, and is guided by the U.S. Office of Housing and Urban Development's (HUD) Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act. Participation in Dane County's Coordinated Entry system is required during the

contract period. The program supervisor or a case manager will be required to attend Coordinated Entry Housing Placement Group meetings.

- **Written Standards**

All CDD-funded projects must comply with applicable sections of the [Madison/Dane County Continuum of Care Written Standards](#).

- **Data and Reporting**

Agencies must be able to collect and report participant-level demographic and service data as described in any resulting contract. Agencies must implement policies and procedures to ensure privacy and confidentiality of participant records - both paper files and electronic databases. Agencies must enter data and adhere to data quality procedures as stipulated in the Dane County Homeless Management Information System (HMIS) Standard Operating Procedures. As a condition of receiving funding, agencies will be required to report in HMIS participant-level data, project services/activities, numbers of households assisted, and project outcomes.

- **Familiarity with Project Based Vouchers (PBV)**

Agencies must have experience working with the local Dane County Housing Authority and/or the City of Madison's Community Development Authority. Staff must have a working knowledge of the rules and regulations surrounding Section 8 housing vouchers and be able to assist residents in all aspects of their utilization.

Note: Heartland Housing is the owner of Tree Lane Apartments. Potential lead applicants are required to meet, in-person or teleconference, with Heartland Housing prior to submitting an application. The contact for Heartland Housing is Lisa Kuklinski, Director of Resident and Community Programs, lkuklinski@heartlandalliance.org or 312-660-1418.

Lead applicant will be required to submit two (2) letters of support from agencies within the Homeless Services Consortium. Agencies submitted as a collaborative partner in this application are not eligible to provide letters of support. A directory of agencies involved in the Homeless Services Consortium is located here: <https://www.danecountyhomeless.org/members>

Criteria for Proposal Review

The following criteria will be considered when reviewing each proposal:

1. Lead Agency Qualifications 40%
 - Experience in Housing First and trauma informed care
 - Experience in working with families experiencing homelessness
 - Experience in providing culturally competent services

- Local preference
2. Lead Agency Project Plans 20%
 - Alignment of project design to achieve the intended outcome
 - Use of industry standard or best practices
 - Plan for continuous quality improvement
 3. Provider Collaboration and Qualifications 30%
 - Lead agency's experience in collaborating with various service providers and stakeholders
 - Lead agency's capacity to lead the proposed team
 - Effectiveness of the proposed team structure to deliver coordinated and person-centered services
 - Partners' experience in Housing First, trauma informed care, and providing culturally competent services
 4. Financial Strength 10%
 - Adequate and reasonable budget
 - Ability to leverage other resources

SECTION 3: PROPOSAL SUBMISSION REQUIREMENTS

3.1 **RESPONSE FORMAT**

1. Applicant agencies will utilize the provided application(s). The response to the RFP should be complete and comprehensive but succinct. Attachments or documents not specifically required should not be submitted.
2. **Proposal must be submitted by e-mail**, with the narrative in the Word format and the budget in the Excel Workbook format provided.

3.2 **REQUIRED INFORMATION AND CONTENT OF PROPOSALS**

Please include only the required submittals specified below.

A. **RFP Application form(s)**

Available on the [Community Development Division Funding Opportunities Website](#)

B. **RFP Budget Workbook**

Available on the [Community Development Division Funding Opportunities Website](#)

C. **Two Letters of Support**

D. **Designation of Proprietary and Confidential Information – Attachment A**

Available on the [Community Development Division Funding Opportunities Website](#)

Complete the form included in this document, if applicable.

SECTION 4: GENERAL RFP ADMINISTRATIVE INFORMATION

4.1. POINT OF CONTACT

The RFP contact identified below is the sole point of contact regarding the RFP from the date of release of the RFP until selection of the successful proposer.

Linette Rhodes, Interim Community Development Grants Supervisor
City of Madison Community Development Division
Phone: 608-261-9240
Email: lrhodes@cityofmadison.com

All communications relating to this RFP must be directed to the designated contact for this RFP. All bidders, proposers, protestors or individuals acting on their behalf are hereby prohibited from attempting to persuade or influence any City agents, employees or any member of the relevant selection team, for or against a specific cause related to a pending solicitation, unless otherwise directed by the RFP contact.

4.2. INQUIRIES AND CLARIFICATION OF SPECIFICATIONS

Proposers shall carefully examine the bid and contract documents, correlate their observations with the RFP specifications, and exercise their own judgment as to the nature and scope of the work required. If applicable, visit the Department's website, [CDD Funding Opportunities](#). Consider federal, state and local laws and regulations that may affect cost, progress, performance or furnishing of the work.

Proposers shall immediately notify the RFP contact of any questions, exceptions, clarification of any ambiguity, error, conflict, discrepancy omission or other deficiency or additions they have concerning the RFP document. Failure to do so will be at bidder's own risk.

This RFP will serve as the basis for or will become part of the resulting agreement. No plea of ignorance of conditions or difficulties that exist or may hereafter arise in the execution of the work under this contract as a result of failure to make necessary examinations and investigations, shall be accepted as an excuse for any failure or omission on the part of the bidder to fulfill the requirements of the contract.

4.3. CONTRACTING AGENCY

The contract resulting from this RFP will be administered by Community Development Division, City of Madison.

4.4. ADDENDA / OFFICIAL COMMUNICATION

During the solicitation process for this RFP, all official communication between the City and proposers will be made via the [Community Development Division Funding Opportunities Website](#). The City will post such notices, which will include, but not be limited to, addenda for any modifications to administrative or performance requirements, clarifications to requirements, and the announcement of the apparent winning proposer(s). It shall be the responsibility of the proposers to regularly monitor this website for any such postings. Failure to retrieve such addenda and include their appropriate provisions in your response, may result in your proposal being disqualified.

4.5. ORAL PRESENTATIONS / SITE VISITS / PRE-BID MEETINGS

Proposers may be asked to attend pre-bid meetings, make oral presentations, or make their facilities available for a site inspection as part of this request for proposal process. Such presentations, meetings or site visits will be at the proposer's expense.

4.6. ACCEPTANCE/REJECTION OF PROPOSALS

1. The City reserves the right to accept or reject any or all proposals submitted, in whole or in part, and to waive any informalities or technicalities, which at the City's discretion is determined to be in the best interests of the City. Further, the City makes no representations that a contract will be awarded to any proposer responding to this request. The City expressly reserves the right to reject any and all proposals responding to this invitation without indicating any reasons for such rejection(s).
2. The City reserves the right to postpone due dates and openings for its own convenience and to withdraw this solicitation at any time without prior notice.

4.7. INCURRING COSTS

This request for proposals does not commit the City to award a contract, pay any costs incurred in preparation of proposals, or to procure or contract for services or equipment.

4.8. PROPOSER QUALIFICATIONS

The City of Madison may make such investigations as it deems necessary to determine the ability of the proposer to perform the work, and the proposer shall furnish to the City all such information and data for this purpose, as the City may request. The City reserves the right to reject any proposal if the evidence submitted by, or investigated of, such proposer fails to satisfy the City that the proposer understands the full scope of work and is properly qualified to carry out the obligations of the contract and to complete the work contemplated herein.

4.9. PROPOSAL CONTENT

The evaluation and selection of a Contractor and the contract will be based on the information submitted in the vendor’s proposal plus any additional information required. Additional information may include references, on-site visits or oral presentations. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a response.

Elaborate proposals (e.g. expensive artwork, news stories or letters of support) beyond information required to present a complete and effective proposal, are not necessary or desired. Information provided by the applicant in addition to the required proposal may not be considered in the evaluation of the proposal.

4.10. WITHDRAWAL OR REVISION OF PROPOSALS

1. A proposer may, without prejudice, withdraw a proposal submitted at any point in the process by requesting such withdrawal in writing (email is sufficient) to the RFP contact.
2. Proposals may not be modified or altered after the deadline.

4.11. DESIGNATION OF PROPRIETARY INFORMATION

Proposers are hereby notified that all information submitted in response to this RFP may be accessible to the public through the Community Development Division website and/or made available for public inspection according to public records laws of the State of Wisconsin or other applicable public record laws. Therefore, proposers are encouraged to refrain from submitting information that cannot be open for public inspection. However, if proposers must include information deemed confidential and proprietary by the proposer, proposer must comply with these instructions:

1. All restrictions on the use or inspection of data contained within a proposal shall be requested prior to submission of the proposal itself. Written requests for confidentiality shall be submitted to the RFP contact by the proposer prior to the proposal submission date.
2. Requests shall use the following process:
 - Email or phone the RFP contact to discuss your concern.
 - Any information to be considered confidential or proprietary must clearly be stated on the attached “Designation of Confidential and Proprietary Information” form. (RFP Form E).
 - Any information to be considered confidential or proprietary must be separated from the rest of the proposal. Co-mingling of confidential/proprietary and other information is not acceptable.
 - Applicants may be asked to submit a written request for information to be considered confidential or proprietary. Provide specific information related to the claim for

confidential and proprietary information including RFP section, page number, topic and specific concern that supports claim.

3. Allocation requests always become public information through the selection committee process. Information usually cannot be kept confidential unless it involves a trade secret as defined in S.134.90(1)(c), Wis. Stats. Any information that will be included in any resulting contract cannot be considered confidential. A proposal, in its entirety, will not be considered confidential and/or proprietary.
4. Proprietary information submitted in a proposal, or in response to the RFP, will be handled in accordance with the applicable Wisconsin State Statute(s). However, the City cannot ensure that the information will not be subject to release if a request is made under applicable public records laws. The City will not provide advance notice to a proposer prior to release of any requested record.
5. The Selected Contractor agrees to hold the City harmless for any damages arising out of the release of any material unless they are specifically identified. In the event the designation of confidentiality of this information is challenged, the Selected Contractor also agrees to provide legal counsel or other necessary assistance to defend the designation of confidentiality and, further, agrees to hold the City harmless from any penalties, costs, damages and fees, including attorney's fees, awarded to the requestor and ordered to paid by the City, in any such legal action.
6. To the extent permitted by law, it is the intention of the City to withhold the contents of the proposal from public view until such times as competitive or bargaining reasons no longer require non-disclosure, in the opinion of the City. At that time, all proposals will be available for review in accordance with the Wisconsin Open Records Law.

4.12. SAMPLE CONTRACT FOR PURCHASE OF SERVICES

Proposers are responsible for reviewing this information on the CDD Funding Process website prior to submission of their bid. The Sample Contract for Purchase of Services shall serve as the basis of the contract resulting from this RFP. The terms of this template contract shall become contractual obligations following award of the RFP. By submitting a proposal, proposers affirm their willingness to enter into a contract containing these terms.

4.13. CITY OF MADISON AND ADDITIONAL STANDARD TERMS AND CONDITIONS

Proposers are responsible for reviewing this information on the [CDD Funding Opportunities website](#) prior to submission of their bid. City of Madison Additional Standard Terms and Conditions are the minimum requirements for the submission of Proposals.

4.14. PROPOSAL EVALUATION AND AWARD

1. PRELIMINARY EVALUATION

Submitted proposals will be reviewed for completeness and compliance with RFP guidelines. All incomplete RFP submissions may be determined nonresponsive and removed from further consideration. To be considered complete, RFPs shall include all required submittals and shall be signed and dated. In the event that no submissions meet all of the RFP requirements, the City of Madison reserves the right to continue the evaluation of the proposals that most closely meet the requirements.

2. PROPOSAL EVALUATIONS, INTERVIEWS AND/OR SITE VISITS

The City's designated RFP Selection Committee will make the final selection and recommendation following the evaluation of the proposals which may include presentations, site visits and interviews, if deemed necessary, with some or all of the proposers. However, the City may make preliminary selection(s) on the basis of the original proposals only, without negotiation, interviews and/or site visits with any proposers. If presentations, interviews and/or site visits are conducted, the Selection Committee may choose to assign additional points for these processes or re-evaluate, re-rate and/or re-rank the finalists' proposals based upon the written documents submitted and any clarifications offered in the interviews.

3. BEST AND FINAL OFFER

The designated Selection Committee may request best and final offers from one or more proposers determined to be reasonably susceptible to being selected for award for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. Proposers shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals, and such revisions may be permitted after submissions and prior to award for the purpose of obtaining best and final offers. If best and final offers are requested, they will be evaluated against the stated criteria, scored and ranked. The City reserves the right to negotiate the terms of the contract, including the award amount, with the selected proposer(s) prior to entering into a contract. If contract negotiations cannot be concluded successfully with the selected proposer(s), the City may negotiate a contract with the next highest scoring proposer.

4. CLARIFICATION OF PROPOSALS

During the evaluation of proposals, the City reserves the right to contact any or all proposers to request additional information for purposes of clarification of RFP responses, reject proposals which contain errors, or at its sole discretion, waive disqualifying errors or gain clarification of error or information.

5. PRICE AND/OR COST ANALYSIS

The City reserves the right to conduct a price and/or cost analysis to determine if the price is fair and reasonable. If only one responsive proposal is received, a detailed price and/or cost analysis may be requested of the single proposer. Proposers shall cooperate as needed with the City's efforts to perform said analyses.

6. NEGOTIATION

The City reserves the right to negotiate final fees and scope of services with the selected Contractor.

7. PROCESS

At any phase, the City reserves the right to terminate, suspend or modify this selection process; reject any or all submittals; and waive any informalities, irregularities or omissions in submittals, all as deemed in the best interests of the City.

8. COMMUNICATION WITH SELECTION COMMITTEE

Proposers may not contact members of the Selection Committee at anytime during the evaluation process, except at the City of Madison CDD request.

9. RIGHT TO REJECT PROPOSALS AND NEGOTIATE CONTRACT TERMS

The City reserves the right to reject any and all proposals and to negotiate the terms of the contract, including the award amount, with the selected proposer(s) prior to entering into a contract. If contract negotiations cannot be concluded successfully with the selected proposer(s), the City may negotiate a contract with the next preferred proposer.

ATTACHMENT A

DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

Proposers are hereby notified that all information submitted in response to this RFP may be made available for public inspection according to public records laws of the State of Wisconsin or other applicable public record laws. Therefore, proposers are encouraged to refrain from submitting information that cannot be open for public inspection. However, if proposers must include information deemed confidential and proprietary by the proposer, proposer must comply with these instructions:

1. Requests for confidentiality must be submitted prior to the proposal submission date to the City of Madison Purchasing Office.
2. Requests for confidentiality must use this designated form. Failure to include this form in the bid/proposal response may mean that all information provided as part of the bid/proposal response will be open to examination and copying. The City considers other markings of confidential in the bid/proposal document to be insufficient.
3. Any information to be considered confidential or proprietary must be separated and packaged from the rest of the proposal. Co-mingling of confidential/proprietary and other information is not acceptable.

Prices always become public information when bids/proposals are opened or when negotiations have been completed and the contract has been awarded. Other information usually cannot be kept confidential unless it involves a trade secret as defined in S.134.90(1)(c), Wis. Stats. Any information that will be included in any resulting contract cannot be considered confidential. A proposal, in its entirety, will not be considered confidential and/or proprietary.

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in s. 134.90(1)(c), Wis. Stats. as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

In the event the designation of confidentiality of this information is challenged, the undersigned hereby agrees to provide legal counsel or other necessary assistance to defend the designation of confidentiality and agrees to hold the City of Madison harmless for any costs or damages arising out of the City's agreeing to withhold the materials.

The attached material submitted in response to Bid/Proposal # _____ includes proprietary and confidential information which qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law. As such, we ask that certain pages, as indicated below, of this bid/proposal response be treated as confidential material and not be released:

Section	Page No.	Topic	Specific law that supports confidentiality of information

Company Name _____

Enter Name: _____

By entering your initials in the box,

You are electronically signing your name and agreeing to the terms above.

Date: _____