

Villages of Mount Pleasant, Sturtevant and
Caledonia Fire/EMS
Request for Proposals
for
Study of Shared Service Models

DATES	ACTION
February 28, 2022:	RFP Issued
March 14, 2022 by 5:00 p.m.:	Deadline for submitting questions via email
March 28, 2022 by 5:00 p.m.:	Addenda issued if required
April 4, 2022 by 12:00 p.m.:	Proposal Submittal Deadline
April 18, 2022:	Evaluations team to meet
April 25, 2022:	Interviews scheduled if needed
May 2, 2022:	Notify selected firm
May/June 2022:	Begin engagement

1. Summary

In Racine County, the Villages of Mount Pleasant, Sturtevant and Caledonia (the Villages) are seeking consulting services to conduct a comprehensive study with the goal of enhancing the existing shared service relationship between the South Shore Fire/EMS (Villages of Mount Pleasant and Sturtevant) and exploring a possible consolidation with the Village of Caledonia Fire/EMS Department. The consultant shall be responsible for evaluating each department, developing shared service options and suggesting an implementation strategy that maintains or improves the existing levels of service. All proposals should clearly define how consultants would work with the Villages to assist in a comprehensive and participatory consolidation process.

2. Background

South Shore Fire/EMS Department

Beginning on January 1, 2009, the Village of Mount Pleasant and the Village of Sturtevant consolidated Fire/EMS services pursuant to Sections 61.65 and 66.0301 of the Wisconsin Statutes. The new Department was renamed South Shore Fire/EMS Department. Under this consolidation, the Village of Mount Pleasant Police and Fire Commission performs all hiring, promotions and disciplining for South Shore Fire/EMS Department. The Fire Chief of the consolidated department reports to the Mount Pleasant Village Administrator. Mount Pleasant performs all accounting, purchasing, payroll and provides all current and future post-employment retirement benefits.

Sturtevant annually pays Mount Pleasant for Fire/EMS service. The cost share for the consolidated service is based on the formula: 1/3 calls, 1/3 population and 1/3 equalized value (excluding Mount Pleasant's TID#5.) There is currently no year-end true-up and no payment for overhead costs.

The consolidation created a Joint Oversight Board with appointments from both Villages. The Joint Oversight Board approves capital purchases and staffing increases, but is not responsible for budgeting for these expenditures. Both Sturtevant's and Mount Pleasant's Village Boards approve the South Shore Fire Department budget.

Caledonia Fire/EMS Department

Caledonia's Fire/EMS Department reports and operates under the guidance of both the Village Administrator and the Police and Fire Commission of the Village of Caledonia. Caledonia is the contracted provider for Fire and EMS services for the Villages of North Bay and Wind Point with a contract term of 01/01/22-12/31/26.

Racine County Dispatch

Racine County Dispatch operates under a consolidated dispatch model. As a department of Racine County, dispatch is a function that used to be maintained by each separate community and can be looked to as a model for consolidation.

3. Key Stakeholders and Topics

The Villages are seeking a consultant to conduct a comprehensive study with the goal of enhancing the existing shared service relationship between the South Shore Fire/EMS (Villages of Mount Pleasant and Sturtevant) and exploring a possible consolidation with the Village of Caledonia Fire/EMS Department. If determined as the best course of action, the consultant will lead them through the process of consolidating the Fire/EMS services into one South Shore Fire/EMS Department. The consultant will also recommend the best detailed structure for a consolidated department. The Villages desire an inclusive process involving input from key stakeholders with particular attention to the topics outlined below.

STAKEHOLDERS

The consultant will interview key stakeholders as needed. The consultant is free to interview other parties as necessary to gain a broader understanding of the operational and policy issues facing the communities. The consultant may contact the following individuals or organizations as necessary to gather the required data or other information necessary to perform the contracted work:

- Village Presidents and Village Administrators
- Department Fire Chiefs and/or Command staff and/or Union representatives
- County Executive
- Racine County Dispatch Managers

TOPICS

- Identification of service demand level expectations.
- Evaluation of specialized services (hazardous materials, special/technical rescue, water rescue, bariatric patient care, etc.) provided by each department.
- Evaluation of each department's effectiveness and efficiencies focusing on reliability, response, overall performance and organizational effectiveness. Included in this should be a basic analysis of station location in relation to operational effectiveness.
- Potential cost savings/cost avoidance, improved productivity, customer service and impact on ISO rating.
- Existing versus future staffing requirements and the effects of enhanced shared services / consolidation on existing staffing levels.
- Critical differences in existing policies, procedures, operating practices, and methods for resolving the differences.
- Differences in wage, benefits, work schedules, and retirement programs and policies (total compensation including all employer costs) and methods for integrating the current compensation policies and benefits of the agencies.
- Identification/resolution of all existing financial obligations for each jurisdiction (i.e., workers compensation costs/claims, general liability costs/claims if any, post-retirement benefits).
- Establishment of the legal and management structure of the newly formed organization, respective agreements and contracts necessary to fully implement any potential consolidation.
- Integration of equipment and technology.
- Recommendations for solutions for support services such as financial services (payroll, accounting, purchasing), telecommunications and information systems management, fleet maintenance and human resource management.
- Recommendations for any additional funding sources not already captured and identify impacts on existing and future funding streams based on consolidation or absence thereof.
- Recommendation for timeline inclusive of the legal, administrative and operational benchmarks the agency should perform in which to allow for an accelerated and smooth consolidation.
- Recommendations for changes to each governing bodies ordinances based on adopted model for consolidation.

4. Scope of Work

The study shall specifically investigate the following cooperative strategies:

- Expansion of current service sharing arrangements
- Expansion of current South Shore Fire/EMS Department contract to include Caledonia
- Consolidation of the South Shore Fire/EMS Department with Caledonia

- Creation of a new South Shore Fire/EMS Department to include Mount Pleasant, Sturtevant and Caledonia

The study should touch on all of the following areas:

1. Fire Rescue Administration/Operations
An organizational overview of the final recommendations inclusive of organizational structure and brief position descriptions for an expanded/consolidated/new department. Identify steps to dissolve, expand/consolidate or create new department.
2. Assets/Fleet/Equipment
Outline the transition of equipment and apparatus (titles, grants, etc.). Outline any equipment and apparatus that can be removed from service. Outline any equipment and apparatus that can be repurposed. Outline any new equipment and apparatus necessary for consolidation. Recommend a direction for maintenance of newly consolidated apparatus and assigned/installed technologies.
3. Personnel
Identify personnel to support service expansion/consolidation. This recommendation may include a phasing out/in of positions, but the overall recommendation should include a proposed structure of a new Department. Recommended salary range of new positions based upon the current salary structures. Details to include transition of Worker's Compensation claims, payroll, discipline, employee file integration, etc. Recommendations regarding the deployment or distribution of personnel.
4. Facilities
Specific recommendations of occupancy of existing facilities. Specific recommendations regarding location of future necessary facilities. Specific recommendations regarding any potential repurpose or relocation of existing facilities. Recommendations regarding deployment locations of apparatus.
5. EMS Billing
Analyze the potential EMS billing process and alternatives for cost effectiveness.
6. Licensing/Inspection
Provide a seamless transition through state and local licensing/inspections.
7. Contracts
Identify existing contracts that would need to be reassigned (EMS services, mutual/auto aid, medical direction, etc.). Necessary policy action by elected officials.
8. Funding
Forecast financial condition of merged/consolidated department/non-consolidated department for five (5) years. Include in analysis the estimates utilized for training costs for various positions. Analyze all associated fees, assessments, taxes, etc. and formulate the best possible plan for cost recovery. Develop a projected integrated budget. Identify financial issues for consideration.
9. Local Oversight, Governing, and Accountability
Political considerations and legal processes. Government structure options.
10. Transitional Costing
Identify approximate costs to secure a smooth transition.

11. Cost Savings

Identify an approximate short and long-term cost savings associated with service expansion/consolidation. Identify savings to either individual entity through enhancements resulting from service expansion/consolidation.

12. Implementation Schedule

Identify an estimated progression of work (monthly timeline of work to be anticipated by the organization) in which to complete the service expansion/consolidation.

5. Deliverables

The Villages expect the following deliverables:

DRAFT REPORT

The consultant shall prepare a draft report for review by the stakeholder group based on the evaluation and recommendations of the Consultant. The Consultant shall provide the Villages adequate time to review all aspects of the assembled draft report. The Consultant will host an appropriate number of stakeholder meetings for the purpose of accomplishing the following: (1) Review draft report with the Villages (2) Identify areas of concern (3) Identify any issues that create barriers (4) Obtain resolution to any issues that create barriers (5) Identify priorities for integration (6) Identify critical paths for successful integration (7) Modify report based on discussions, and (8) Achieve consensus on final report

FINAL REPORT

The Consultant will complete any necessary revisions and produce 25 copies of publication, quality bound, final versions of the written report, along with an electronic version in Word and PDF file format. The final report shall also include a schedule (timeline of progress) in which the recommendations are to occur.

PRESENTATIONS

The Consultant will be required to make a minimum of three formal presentations on the overall project. These presentations will include: (1) Review and explanation of the proposed recommendations (2) Explanation of supportive charts, graphs, diagrams, and maps, where appropriate (3) A schedule of the suggested implementation (monthly progress timeline for option(s)) (4) Opportunity for questions and answers, as needed. All presentation materials, files, graphics, and written material to be provided to the Villages at the conclusion of the presentations.

6. Proposal Content

a. Step 1 (Technical and Qualifications)

Proposals should include the following information, presented in a clear, comprehensive, and concise manner, to illustrate the firm's capabilities and technical approach to the work.

Information Required of Respondents:

- i. Firm name, business address, telephone, and contact.
- ii. Description of the firm.
Include history, size, and statement of ability to perform the work.
- iii. Summary of the Proposal.
- iv. Work Plan & Timeline.

Provide information about proposed activities including a timeline for completion and deliverables.

- v. Staffing Plan, Including Resumes.
Please identify each person who will work on the project and identify his or her role. Please provide a resume and references for each member.
- vi. References.
Please provide the names of three references that you have worked with on similar projects.

b. Step 2 (Pricing)

Included in a separate document:

- i. A project budget that includes a “not to exceed” cost for professional services to complete study and final deliverables. The “not to exceed” costs should be an all-inclusive cost to include all elements of this assignment, including travel, meeting facilitation, document preparation and printing costs. The budget shall also include any limitations to the scope of work.
- ii. The pricing document should also include any potential work not defined within the proposed scope of services, or not mentioned in this RFP.

7. Submission of Proposals

Applicants should send seven (7) complete bound copies and one electronic copy (emailed) of the technical proposal for Step 1. Please also include a separate sealed envelope labeled with the firm name marked "**Cost to Complete Study of Shared Services Model Proposal**" for Step 2 by the deadline listed on the front of the RFP to the following address:

Racine County Executive Jonathan Delagrave
Courthouse (10th Floor)
730 Wisconsin Avenue
Racine, WI 53403
Jonathan.Delagrave@racinecounty.com

8. Evaluation of Proposals

Evaluation Procedure

The Villages will review all proposals and score according to the evaluation criteria as outlined below. The cost proposals will then be opened and scored. The top scoring proposals may move onto interviews with the selection panel. The Villages reserve the right to negotiate with the successful respondent in the addition or deletion of tasks included with the RFP.

Contract Negotiations

Once the Villages have selected a consultant based on the selection criteria rating and interview process, the Villages will negotiate a contract with the selected Proposer. If no agreement can be negotiated, the Villages may choose to negotiate with the next highest scoring respondent. Any contract will not be considered executed unless approved by the Villages and signed by the Villages or their designee. Upon selection of the top-rated firm, the Villages may enter into limited negotiations with the selected top-rated firm to clarify the scope of services to be provided. Note, however, that costs for services are part of the evaluation and scoring of points. You are encouraged to submit your best and final offer with the proposal. Upon mutually agreeing to the terms of the contract, written agreement will be prepared by the Villages utilizing the Village’s contract agreements (amended to the specific terms of this contract). It is important to note that the Villages will not indemnify the Consultant. The Villages will own all documents and drawings they pay a Consultant to prepare.

Evaluation Factors and Points

- a. Step 1
 - i. Relevant knowledge, experience, and qualifications of the firm and team members (25).
 - ii. Proposed methodology and work plan used in the process (25).
 - iii. Understanding of the project and overall completeness of submission (25).
 - iv. Experience on similar projects/References (25)
- b. Step 2
 - i. Proposed project costs and fee schedules (25).

Disqualification

Non-responsive proposals will also receive no consideration. A “responsive” proposal conforms in all material respects to the RFP.

9. Questions Regarding the RFP

Please send questions to all three individuals listed below:

Amanda Gain GainA@sturtevant-wi.gov

Kathy Kasper kkasper@caledonia-wi.gov

Maureen Murphy MMurphy@mtpleasantwi.gov

10. General Provisions

Withdrawal of RFP - Qualification and proposal information may be withdrawn from consideration prior to the submission deadline by written request, on the Consultant’s letterhead, submitted to the Racine County Executive.

RFP Postponement or Cancellation - The Villages may, at their sole and absolute discretion, reject any and all submissions, or parts of any and all submittals to the RFP, re-advertise this RFP, postpone or cancel at any time this RFP process, or waive any irregularities in this RFP as it deems to be in the best interest of the Villages.

Incurring Costs - The Villages are not liable for any cost incurred by proposers in replying to this RFP. The Villages reserve the right to accept or reject any or all proposals and to waive technicalities in any proposal or part thereof deemed to be in the best interest of the Villages.

Proprietary Information- Any restrictions on the use of data contained within a proposal must be clearly stated in the proposal itself. Each page must be clearly marked "CONFIDENTIAL". Regardless of the Proposer’s request or desire to keep submitted materials confidential, the Villages shall comply with State and Federal Law(s) as to complying with request for information and shall be held harmless by Proposers for the release of any information in response to a request pursuant to State and/or Federal law.

Fixed Price Period - All price, cost, and conditions outlined in the RFP/Price Proposal shall remain fixed and valid for acceptance for a 90-day period commencing on the due date of the contractor’s proposal. The Villages reserve the right to negotiate the scope of services and cost with any Proposer.

Certification of Independent Price Determination - By signing this proposal, the respondent certifies, and in the case of a joint proposal, each party thereto certifies as to its own organization, that in connection with this procurement: The process in this proposal has been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other respondent or with any competitor;

Unless otherwise required by law, the prices which have been quoted in this proposal have not been knowingly disclosed by the respondent and will not knowingly be disclosed by the respondent prior to opening in the case of an advertised procurement or prior to award in the case of a negotiated procurement, directly or indirectly to any other respondent or to any competitor;

Restricting Competition - No attempt has been made or will be made by the respondent to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

The Villages are exempt from payment of all federal, state and local taxes in connection with this proposed Contract.