



OCTOBER 21, 2024
Updated 11/8/2024

RE: City of Oshkosh - Request for Proposals – Development Review Process Assessment

A. OVERVIEW

The City of Oshkosh is interested in conducting a thorough assessment of its development review process to improve internal processes, establish consistent outcomes, and identify improvements to streamline the overall review process. The City last completed a development review process update in 2010 but is looking to identify solutions to make additional improvements to the process. Staff has made notable enhancements to streamline the review process over the past fourteen (14) years including updating the plan submittal process, establishing deadlines for internal staff to review plans, upgrading the city’s permitting and plan review platform (Evolve), creating an online portal to submit plans, improving communication with developers, obtaining certification to be a registered agent in the state to review building, HVAC and plumbing plans and reaching out to contractors for input on how the city can improve.

The Community Development Department, in concert with other City departments, currently processes an average of 200 site plan applications per year, of which around ten (10) percent would be considered large development applications. The Inspection Services Division processes an average of 150 building, HVAC, and/or plumbing plans annually which are reviewed by city staff or outsourced to a third-party reviewer.

Improvement to the development review process completed by city staff is a goal that the Oshkosh Common Council has identified within their *2025-2026 City of Oshkosh Strategic Plan*; with overarching objectives focused on establishing consistent and effective review processes, consistent application of the building and zoning codes, obtaining constructive feedback from the city’s customers going through the development process and improving internal processes to reduce unnecessary staff work.

The Community Development Department has the largest role in the development review process through the Economic Development Division, Planning and Zoning Division and the Inspection Services Division all within the Department.

Please note that there is another RFP that the City has released concurrently in addition to this RFP for services to conduct a thorough assessment of the municipal codes that City’s Inspection Services Division administers as well as analyzing permits required for residential and commercial projects, associated plan application fees and permit fees in an



effort to ensure that the city is development-friendly yet protecting the health and safety of the residents. The city will permit a consultant to submit a proposal in response to both RFPs.

B. OBJECTIVES

The City seeks proposals from qualified individuals or firms to provide professional services to conduct a thorough review and evaluation of the development review process, provide recommendations for process improvements, and establish on-going procedures to facilitate implementation and improve service delivery. The selected Consultant shall work closely with City staff from multiple departments to: 1) evaluate the City's development review/planning application process and recommend improvements; 2) evaluate and recommend improvements to the City's internal Development Review Committee ("DRC") procedures to gain efficiencies; 3) evaluate how City departments review processes and task assignments are functioning and where efficiencies can be gained; 4) establish implementation procedures for the agreed-upon changes; 5) determine if the City is using best practices to communicate expectations and requirements to the private development community during projects; and, 6) engage with internal and external stakeholders aligned with the development review process.

Consultant recommendations should be supported by best practices or evidence-based operational practices. See the Scope of Services below for a more detailed list of objectives.

C. PROJECT TEAM

City staff members from various city departments, with participation from private developers, contractors, engineers, architects and/or community economic development partners, will act as a steering committee that will provide regular ongoing direction to the consultant as needed.

D. CONTENTS OF PROPOSAL

The following information is to be submitted as part of the proposal:

- Cover pages, appendix materials, and table of contents
- Please use 11-point font or larger and do not use 11"x17" sheets
- Attachments may be included as appropriate
- The proposal should follow the layout below by section with each section separated by a tab



1. **Executive Summary:** The consultant should address their approach to the project in terms that would be understood by the general public.
2. **Cover Letter:** A cover letter must be attached and must include the following:
 - a. Project title- "City of Oshkosh - Development Review Process Assessment RFP Submittal - *YOUR FIRM NAME*"
 - b. Name(s) of the person(s) authorized to represent the consultant in any negotiations
 - c. Name(s) of the person(s) authorized to sign any contract that may result;
 - d. Contact person's name, mailing or street address, phone number, and email address
 - e. Any additional items the consultant believes should be added to the cover letter
3. **Introduction:** Understanding of the project goal of assessing the City's current development review process and the anticipated scope of work listed in Section E of this RFP.
4. **Firm Description:** Describe the firm's qualifications, areas of expertise, length of time in business, number of employees, and other information that would be helpful in characterizing the firm. Describe the resource availability to perform the work for the duration of the project. Provide the location of the firm's home office and the address of the office that will manage the project, if different.
5. **Project Team:** Include an organizational chart and task matrix detailing the division of responsibilities. Provide a professional resume for key personnel, including major sub-consultants proposed to be assigned to the project. Describe their unique qualifications and relevant experience on similar or related projects. Response submittals must identify a proposed project manager who would be responsible for the day-to-day management of project tasks and would be the primary point of contact with your firm.
6. **Technical Proposal and Work Plan:** Describe how you would propose to accomplish the major tasks identified in the Scope of Work in Section E of this RFP. If applicable, discuss any unique aspects of the project, alternative approaches that might be considered, or any other special considerations. Include recommendations or suggested modifications to the Scope of Services. Identify tasks that the Consultant will perform versus tasks that City staff will perform or coordinate. Include the proposed project schedule.
7. **References:** Provide the names of at least two (2) comparable-sized municipalities, preferably or private clients for which the firm has conducted similar work within the past six (6) years.



8. **Fees:** List a per-hour budget estimate associated with the anticipated scope of work and meetings in Section E of this RFP as well as any alternative services.

E. SCOPE OF WORK

1. Organization and Operations Assessment with a Comparative Analysis:

- a. Review and analyze the City's site plan review process and approval process.
- b. Review and analyze the City's building plan, permit, and inspections process.
- c. Review and analyze the City's Engineering Division approval process related to development.
- d. Review whether the various processes to approve, permit, and inspect projects are optimally managed, coordinated and integrated.
- e. Identify five (5) similar sized municipalities in Wisconsin and compare the City's processes to those other communities.
- f. Analyze opportunities to incorporate existing or emerging field technologies into the city's review, permitting, and inspection processes.
- g. Review and analyze all types and forms of internal and external communications used by the city to educate residents and developers throughout the different steps of the development process.
- h. Outreach to stakeholders to obtain feedback on customer and/or staff communications and perceptions of the processes.
- i. Any additional items that the consultant believes should be added to analyze the existing process.

2. Final Report with Executive Summary, Recommendations, and Implementation Plan:

- a. Executive Summary to summarize the approach, key findings and recommendations.
- b. Identify improvements to the City's site plan review and approval process, building plan, permit and inspections process and the Engineering Division approval process related to development.
- c. Identify options for internal staff efficiency improvements.
- d. Identify public and private perceptions of developing in Oshkosh that are obstacles in achieving both a "customer-friendly community" reputation and the city's desired development standards. Identify solutions to improve the perceptions.
- e. Identify options and processes for improving internal and external communications to streamline the development, permitting and inspections processes.
- f. Identify any emerging community development trends (local, state, or national) that would have a positive impact on the city's development review process.



- g. Establish a timeline to implement specific recommendations over a one (1) year period.
- h. Any additional items that the consultant believes should be added to the recommendations and implementation plan.

3. Meetings:

- a. Project kick-off meeting with the staff project team to identify and refine the scope of work, confirm the timeline, clarify roles and responsibilities, and identify project resources
- b. The city expects that most meetings can be held virtually with a minimum of three (3) in person meetings or as determined by the final contract
 - i. In person meetings may include discussions with members of the private development community, stakeholders and city partners.

4. Any additional items the consultant believes should be added to the project.

F. SELECTION PROCESS

Explain how the firm can conduct this study and why it is qualified. Proposals will be evaluated by the project team on criteria that include:

- Demonstrated understanding of the Scope of Services
- Previous experience with similar projects and other relevant agencies within the past six (6) years (min. two (2) examples)
- The overall quality of the proposal
- Cost of services

The city project team will review the submitted proposals and recommend a firm to the City Manager to enter into an agreement with. The recommendation will be based equally on the firm's experience/capabilities, cost and project approach. The City of Oshkosh reserves the right to reject any and all proposals and to award the project in the best interests of the City.

G. PROPOSAL SUBMISSION

Submit one (1) high-resolution digital copy in PDF format of the proposal to knieforth@oshkoshwi.gov by 3:00 P.M. on November 15, 2024. Files over 10 MB will not be accepted via city email so a transfer link can be emailed with the proposal. Please title the email "City of Oshkosh - Development Review Process Assessment RFP Submittal - *YOUR FIRM NAME*". Once the proposal is received, city staff will confirm receipt. It is highly encouraged that consultants contact Kelly Nieforth prior to submission if there are questions.



H. BUDGET

A budget will be determined based on information provided in submittals. Please provide information on services that city staff can conduct to reduce project costs.

I. TIMELINE

Below is the proposed timeline for the selection of the consultant and overall project. The City will accept questions about the RFP from consultants and will provide answers to those questions to all interested parties.

| Item | Date |
|---|---------------------------------|
| Formal Release Date of RFP | October 22, 2024 |
| Questions From Consultants Due | November 4, 2024 at 3:00pm CST |
| City Answers Questions from Consultants | November 8, 2024 at 3:00pm CST |
| Proposal Deadline | November 15, 2024 at 3:00pm CST |
| City Review of Submittals | Week of November 18, 2024 |
| Consultant Interviews (as needed) | Week of November 18, 2024 |
| Contract Negotiations | End of November 2024 |
| Common Council Approval | December 2024 |
| Project Begins | January 2025 |
| Project Completed | July 2025 |

NOTE: All dates are tentative and subject to change.

J. PROJECT CONTACT

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Oshkosh, WI 54903-1130

11/8/2024

Questions from consultants for Development Review Process Assessment RFP

1. For the Development Review Process, the number of building/HVAC/plumbing plans (150) seems low. What types of projects does this include? Does the scope of work include processes for permits that do not require plan review?

Not all permits require a plan. The 150 plans figure in the RFP are for commercial, industrial and multifamily projects. The scope of work does include reviewing the permits required, permit process, etc. for permits that do not require a plan. Typically residential permits do not require elaborate plans included in the 150 figure above, just simple site plans for our records.

2. Does the City have established budgets for these two projects? And if so, can those budgets be shared with proposers?

There is no set budget but the city has funds available to use.

3. Does the City have desired start and end dates for the Development Review Process Assessment and the Inspections Codes, Permits and Fees Review?

The City would like to have the project start in January of 2025 and be completed by July 2025 in order to budget for any costs in 2026 that are recommended as part of the study.

4. Does the City anticipate the need for any presentations before City Council?

If Council would like a presentation, then we would ask the consultant to present to Council. Please include the cost for a Council presentation.

5. Is it the City's desire to have the same consultant firm managing both projects or could two different firms lead the respective projects? With both RFPs out concurrently, how does the City envision both projects working together?

No, the city will not require that the consultant is the same for both projects. Two different firms can work on each project. The city does not anticipate that the firms will need to coordinate with each other on specific aspects of each plan. City staff will handle coordination if necessary.