



Request for Proposal –ISSUED SEPTEMBER 13, 2021

VILLAGE OF SHOREWOOD – HYBRID FORM BASED CODE ZONING UPDATE

Proposal Requested

The Village of Shorewood is seeking a consultant to update the [Commercial and Mixed-Use Districts](#) within its Zoning Code to include form-based elements alongside updated use classifications (hybrid). The Village's [Central District Master Plan Design Guidelines](#) shall serve as a starting point, but incorporation of additional "best practice" form-based elements are expected. This project is being initiated upon the recent adoption of the [Village of Shorewood Comprehensive Plan 2040](#). The consultant will work with the Planning & Development Director, Plan Commission and Design Review Board to review the existing code and built environment, facilitate public engagement, and draft the proposed update for consideration by the Village Board.

See the Project Scope included within this RFP for complete details.

Project Background

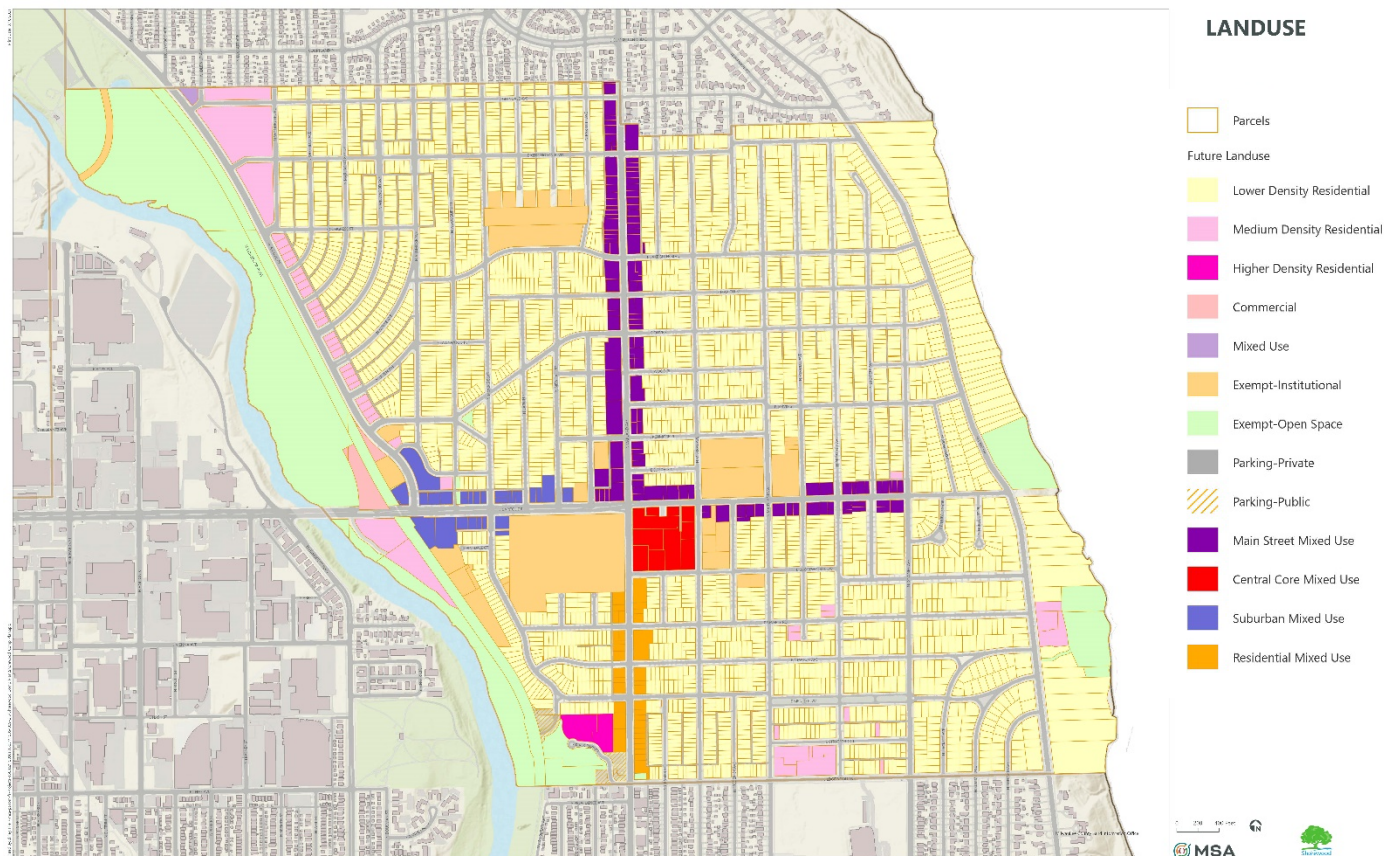
The village of Shorewood, Wisconsin (population 13,315 – 1.6 sq. miles) is located within Milwaukee County's North Shore communities. It is a built-out, first-ring, urban suburb of the city of Milwaukee that is amongst the most densely developed municipalities in the state of Wisconsin. The village is a walkable and bikeable community served by public transit. It is located adjacent to the University of Wisconsin-Milwaukee, and within a short commute to employment within Downtown Milwaukee.

Over the last decade, the village has witnessed significant growth in its commercial corridors, much of which was accomplished through Planned Development Districts. Some of that recent growth has challenged community perceptions. Based on known [redevelopment opportunities](#) and its desirable location and real estate market, the village expects to see continued redevelopment. It is hoped that a well-designed hybrid form-based code will foster predictable improvements that are compatible with existing context and aligned with community expectations.





There are two intersecting commercial corridors (N. Oakland Ave. and E. Capitol Dr.) in the village that have significant multi-story office, residential and mixed-use properties. This project will focus on updating the zoning standards of these corridors. The N. Oakland Ave. corridor is approximately 1.25 miles. North of E. Capitol Dr. it serves as the village's traditional, walkable main street. N. Oakland Ave. south of E. Capitol Dr. contains areas of mixed-use development but is more high-density residential in character. E. Capitol Dr., which is also State Highway 190, features a two-lane divided roadway west of N. Oakland Ave., but a more walkable small-scale development pattern east of N. Oakland Ave. E. Capitol Dr. also features significant portions of institutional development (Shorewood High School, Atwater Elementary School and St. Robert's Church).



The project will be led by the Planning & Development Director under the oversight of the Plan Commission and in consultation with the Design Review Board. Ultimate approval will be required through the Village Board.

Additional engagement with other Village committees and staff will be expected throughout the process. Communication with and to those groups will be coordinated through the project leader (Planning and Development Director).

Estimated Timeline

The Village anticipates that this update can be undertaken in the winter and spring with approval in summer of 2022. Details of the RFP timeline are noted below.

RFP published	September 13, 2021
Deadline for proposal questions and notice of interest	September 24, 2021
Proposal question responses emailed to consultants of interest	October 1, 2021
Proposals due	October 15, 2021
Firms notified of interview (if needed)	October 29, 2021
Interviews (if needed)	November 8-12, 2021
Plan Commission recommendation	November 23, 2021
Village Board approval of contract	December 6, 2021

The proposed review timeline is subject to change at the discretion of the Village. The Village anticipates the need to conduct interviews within this RFP process. The Village will not be legally obligated to adhere to the dates for interviews, recommendations, and award. Interviews will be with staff and possible representative(s) of the Plan Commission, Design Review Board and Village Board.

Project Scope

PRIMARY WORK PRODUCT: This contract will result in a proposed hybrid form-based code, meant to update the present zoning ordinance and other local land development regulations that apply to Shorewood’s commercial corridors.

Task 1 Initial Review, Analysis and Project Introduction

- A. Research and Interviews.** The Consultant will review the existing, applicable zoning standards and design guidelines in preparation to commence the project. Upon familiarity, the Consultant will interview appropriate stakeholders involved with the project. These interviews will include groups and individuals including elected officials, nonprofit organization leaders, property owners, neighborhood representatives, local design professionals, developers, business organizations, and municipal staff.
- B. Site Analysis.** The Consultant will become familiar with the physical details of Shorewood’s commercial corridors and the historic patterns of urbanism and architecture in the surrounding area.
- C. Communication.** The Consultant will draft a press release to inform the local community about the planning efforts to be undertaken. The Consultant will provide information for the Village of Shorewood’s website, including text, photographs, maps, renderings, and other images. This material will describe the Consultant’s credentials and help explain the project’s process.
- D. Project Introduction.** The Consultant will introduce the project and present the findings from their initial review and analysis to the Plan Commission.

Task 2 Public Design Process

- A. Generate necessary background maps.** The Village of Shorewood will provide all necessary base map information as needed by the Consultant. These documents will be used to produce the maps that will be used during the preparation of the hybrid form-based code.
- B. Public Workshop and/or Design Charrette.** The Consultant will organize and lead at least two design workshops or full planning charrettes to engage the community, gather ideas and goals, and formulate implementation strategies. The Consultant will tailor the workshops or charrettes to obtain maximum community input to produce the best possible master plan on which to base the new code. The charrette format will also take into consideration the findings of the initial site analysis, input from staff, and information obtained at previous meetings, workshops, and interviews. While the result will be new land development regulations, the public process will include discussions of alternatives for street design, street connectivity, and town planning strategies that create vital town centers, corridors, and livable neighborhoods. At the conclusion of the workshops, the Consultant will present the work generated to-date to the Plan Commission, including plans, renderings, and initial coding ideas that reflect ideas articulated in the workshops. It is essential that local government officials attend this presentation along with citizens, stakeholders and staff.

Task 3 Drafting the Hybrid Form-Based Code

- A. Design Parameters for the Hybrid Form-Based Code.** The new code will regulate development to ensure high-quality public spaces defined by a variety of building types and uses including housing, retail, and office space. The new code will incorporate a regulating plan, building form standards, use regulations as needed, descriptive building or lot types, and other elements needed to implement the principles of functional and vital urbanism and practical management of growth. Sections of this document would typically include the following:
 - 1. Overview, including definitions, principles, and intent; and explanation of the regulations and process in clear user-friendly language.
 - 2. Regulating Plan (a schematic representation of the master plan) illustrating the location of streets, blocks, public spaces (such as greens, squares, and parks), and other special features. Regulating plans may also include aspects of Building Form Standards such as “build-to-lines” or “required building lines” and building type or form designations.
 - 3. Building Form Standards governing basic building form, placement, and fundamental urban elements to ensure that all buildings complement neighboring structures and the street. These standards should be based upon study of building types appropriate for the region, climate, and neighborhood vitality.
 - 4. As determined to be necessary, building or lot types, architectural standards, landscape standards and parking standards shall be incorporated.
- B. Integration of the Hybrid Form-Based Code.** The hybrid form-based code must be integrated into the Village of Shorewood’s existing regulatory framework in a manner that ensures procedural consistency, conformity with state and local legal requirements, provides clarity as to applicability of existing regulations, and maximizes the effectiveness of the code.

Task 4 Refining the Hybrid Form-Based Code

- A. Presentation of First Draft.** The Consultant will present the first draft of the hybrid form-based code to the Plan Commission for the purpose of gathering comments. The presentation may be made before a joint gathering of municipal boards and committees, as determined by the Village of Shorewood.
- B. Presentation of the Second Draft.** After making revisions in response to comments on the first draft, the Consultant will present the second draft of the hybrid form-based code at another meeting to the Plan Commission for recommendation of approval, as determined by the Village of Shorewood.

Task 5 Approval Process

- A. Public Hearing Presentations.** Upon recommendation of the draft hybrid form-based code by the Plan Commission, the consultant will make a formal presentation to the Village Board.
- B. Additional Revisions.** The Consultant will be responsible for up to two rounds of revisions that may become necessary between presentations. Village staff will be responsible for collecting comments, questions, and suggestions for these refinements from various sources and consolidating them into a series of action items for revision or responses.

Proposal Content

The proposal should not exceed 10 single-sided pages, not including appendices, and should address the following:

- 1. Transmittal Information
 - a. Firm's name, address, telephone number and contact person(s).
 - b. Firm's confirmation of understanding of the project and commitment to provide the appropriate personnel, equipment and facilities to perform the scope of services as defined in this document.
- 2. Approach
 - a. Provide a description of the anticipated planning efforts in relation to the defined Project Scope.
 - b. Identify your expected public engagement efforts, including number and purpose of meetings or other activities. Please include details of virtual or in-person expectations.
 - c. Outline your proposed staffing levels and activities.
 - d. Provide estimated hours for all tasks.
- 3. Personnel Experience

For each project team member please submit a BRIEF description of the following:

 - a. Name
 - b. Proposed responsibilities
 - c. Professional registrations
 - d. Description of related past experience, particularly experience of a similar capacity on projects of comparable size and/or scope
 - e. Profiles or resumes may be included within appendices.
- 4. Previous work samples and references
 - a. Provide examples of previous, related work, including at least one adopted municipal hybrid form-based code. Full documents may be attached as hyperlinks or appendices, as necessary.
 - b. Provide a list of references of comparable clients.

5. Cost
 - a. Provide a cost “not to exceed” per task along with an hourly rate for each project team member working on those tasks and the expected hours by task and position to satisfactorily perform the scope of services.
 - i. Costs shall be commensurate to the proposed work. The Village does not anticipate costs to exceed \$50,000 but will review all proposals.
 - b. Please note there will be no reimbursement for travel time, meals, or mileage; these incidental costs should be included in the hourly rates.
 - c. Describe the circumstances under which you would propose to modify the fees, including the rate at which the Village would be charged for additional work, and how you would communicate such a potential modification to the Village of Shorewood.
6. Contract
 - a. Please attach a copy of your standard contract for these types of services in the email submitting the proposal.
7. Insurance
 - a. The proposal must include either a description of the firm’s insurance or a certificate of insurance outlining the firm’s insurance policies which evidence compliance with the requirements noted in the *Terms and Conditions* section of this RFP.

Terms and Conditions

Payment Terms

All invoices for services will be processed within 30 days based upon completion of defined deliverables to be confirmed within the contract, pending verification and the receipt of any required documentation of services provided in accordance with the terms of the agreement. Payment will be issued based on monthly invoices for payment based on an hourly rate and identification of percentage of tasks completed.

Insurance

The successful firm shall agree that it will, at all times during the term of the agreement, keep in force and effect insurance policies required by the contract, issued by a company or companies authorized to do business in the State of Wisconsin and satisfactory to the Village. Such insurance shall be primary. Prior to execution of the written contract, the successful firm shall furnish the Village with a Certificate of Insurance listing the Village as an additional insured and upon request, certified copies of the required insurance policies. The Certificate shall reference the contract and provide for thirty (30) days advance notice of cancellation or nonrenewal during the term of the agreement. Failure to submit an insurance certificate, as required, can make the contract voidable at the Village’s discretion. Additionally, the Firm shall not allow any subcontractor to commence work until the aforementioned documents, where applicable, have been obtained from the subcontractor and approved by Village of Shorewood.

Nondiscrimination

In connection with the performance of work under this agreement, the Firm agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, marital status, sexual orientation, sex, disability, national origin or ancestry. This provision must be included in all subcontracts.

Assignment or Subcontract

The contract may not be assigned or subcontracted by the firm without the written consent of the Village. If all or a portion of the contract work is proposed to be assigned or subcontracted, the name of the individual(s) to complete the work, address and firm proposed shall be submitted within the scope of the proposal.

Independent Contractor Status

The firm agrees that it is an Independent Contractor with respect to the services provided pursuant to this agreement. Nothing in this agreement shall be considered to create the relationship of employer and employee between the parties.

Amendments to Contract

This contract may be modified only by written amendment to the contract, signed by both parties.

Waiver

One or more waivers by any party of any term of the contract will not be construed as a waiver of a subsequent breach of the same or any other term. The consent or approval given by any party with respect to any act by the other party requiring such consent or approval shall not be deemed to waive the need for further consent or approval of any subsequent similar act by such party.

Indemnification and Defense of Suits

The firm agrees to indemnify, hold harmless, and defend the Village, its officers, agents and employees from any and all liability including claims, demands, damages, actions or causes of action, together with any and all losses, costs, or expense, including attorney fees, where such liability is founded upon or grows out of the acts, errors, or omissions of the firm, its employees, agents or subcontractors.

Contract Period

The term of this contract will be specified in the contract based on the expected timeline to complete the required analysis and plan document.

Termination of Contract

To be defined in the contract.

Professional Services Contract

If your proposal is accepted and a contract is issued, then this Request for Proposal and all documents attached hereto including any amendments, the firm's technical and price proposals, and any other written offers/clarifications made by the firm and accepted by the Village, will be incorporated into a contract between the Village and the firm, it shall contain all the terms and conditions agreed on by the parties hereto, and no other agreement regarding the subject matter of this proposal shall be determined to exist or bind any of the parties hereto.

The submission of a proposal shall be considered as a representation that the firm has carefully investigated all conditions, has full knowledge of the scope, nature and quality of work required, and is familiar with all applicable State, Federal and Local regulations that affect, or may at some future date affect the performance of this contract.

Acceptance of this proposal will take place only upon award by the Village Board, execution of the contract by the proper Village officials, and delivery of the fully executed contract to the firm. Acceptance may be revoked

at any time prior to delivery of the fully executed contract to the successful firm. The contract may be amended only by written agreement between the firm and the Village of Shorewood.

Selection Criteria

Village staff will consider the following in evaluation of the proposals:

1. Past record of performance of the consultant and team on similar projects.
2. Quality and content of the written proposal.
3. Experience and technical competence of the consultant and project team assigned to the project (developing municipal hybrid form-based codes, building community consensus, written and oral presentation skills, etc.), including previous work samples and references.
4. Familiarity of the consultant with the types of issues typically encountered on projects such as this and the recommended alternatives to address such issues.
5. General understanding and agreement with the consultant's approach to the project, including public engagement and the Village's confidence in the consultant's ability to satisfactorily perform the work.
6. Ability to complete the project within the necessary time frame.
7. Participation of Disadvantaged Business Enterprises.
8. Cost.

Instructions to Firms

Submittal Instructions

1. Please provide one (1) digital copy of the proposal to:
Bart Griepentrog, AICP, Planning & Development Director
bgriepentrog@villageofshorewood.org
Identify proposal name within the subject line of the email:
Hybrid Form-Based Code Zoning Update
Deadline:
4:30 PM CST
Friday, October 15, 2021
2. Proposals will be accepted on or before the deadline identified above. Proposals received after that date and time will be rejected. Proposals will not be opened publicly.
3. Questions regarding this RFP should only be directed to staff member identified above. Contact with elected officials, committee members and other staff members is grounds for disqualification.

This RFP does not commit the Village to award a contract, to pay any costs incurred in the preparation of a response to this request or to procure or contract for services or supplies. Depending on cost, the Village may opt to remove portions of the scope, prior to the contract period. The Village reserves the right to accept or reject any or all proposals received as a result of this request, to waive minor irregularities in the procedure, to negotiate with any qualified source, or to cancel in part or in its entirety, this RFP, if it is in the best interest of the Village of Shorewood to do so.

Amendments

Amendment of proposals may be done as follows:

By Village: This Request for Proposals may be amended by the Village in response to need for further clarification, specifications and/or requirements changes, new opening date, etc. Copies of the amendment will be mailed to prospective vendors.

By Firm: Proposals may only be amended by submitting a later-dated proposal that specifically states that it is amending an earlier proposal. No proposal may be amended after the proposal due date, unless requested by the Village.

Proposals may be withdrawn only in total, and only by a written request to the Village prior to the time and date scheduled for opening of proposals.

Contract Administration

The primary contact for contract administration of this proposal:

Bart Griepentrog, AICP, Planning & Development Director
bgriepentrog@villageofshorewood.org
(414) 847-2647

In the absence of the primary contact, the secondary contact for contraction administration is:

Rebecca Ewald, Village Manager
rewald@villageofshorewood.org
(414) 847-2701

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