

Request for Proposals  
Comprehensive Plan &  
Zoning Ordinance Update  
City of Oak Creek, WI

Release Date: October 20, 2017

Proposal Submittal Deadline: December 1, 2017

<http://www.oakcreekwi.org/contracts>



## 55TABLE OF CONTENTS

SECTION 1: INTRODUCTION .....	1
<i>Purpose</i> .....	1
<i>History &amp; Background</i> .....	1
SECTION 2: SCOPE OF PROJECT .....	2
<i>Expectations</i> .....	2
<i>Services</i> .....	2
<i>Community Involvement in Decision Making</i> .....	4
<i>Existing Plans</i> .....	4
<i>Products &amp; Deliverables</i> .....	4
<i>Community Engagement Tools</i> .....	6
<i>Meetings &amp; Presentations</i> .....	6
<i>GIS Data</i> .....	6
SECTION 3: PROPOSAL REQUIREMENTS.....	7
<i>Proposal Submission Requirements</i> .....	7
<i>Proposal Format</i> .....	7
<i>Tentative Schedule</i> .....	9
<i>Questions</i> .....	10
SECTION 4; EVALUATION & CONSULTANT SELECTION.....	10
<i>Selection Process</i> .....	10
<i>Evaluation Criteria</i> .....	11
SECTION 5: ADDITIONAL INFORMATION .....	11
<i>Consulting Agreement</i> .....	11
<i>Insurance</i> .....	11
<i>Acceptance of Terms</i> .....	11
<i>Reference Materials</i> .....	11

## **SECTION 1: Introduction**

### Purpose

The purpose of this Request for Proposals (RFP) is to receive competitive proposals from qualified planning individuals and consultant teams (hereinafter referred to in the singular as “consultant”) who are interested in carrying out 1) a comprehensive update to 2020 Vision – A Comprehensive Plan for the City of Oak Creek (“Plan Update”), which was last adopted in 2002, and 2) an update to and revision of Chapter 17 of the Municipal Code (“Zoning Code Update”). The Plan Update should provide a vision, goals, objectives, and policies that will guide the City’s future land use decisions and will incorporate plans currently in progress. A Plan Update will assist City staff, Plan Commission, Common Council, and advisory committees to gauge the direction in which citizens and various other stakeholders within the community would like to see the City advance. The Plan Update must provide guidance to the City on appropriate implementation of new development and redevelopment plans within the community, while also meeting the service demands that come with community growth.

Following the adoption of the comprehensive plan update, an update to and revision of Chapter 17 of the Municipal Code, the Zoning Code will be developed and adopted. The Zoning Code Update will incorporate revisions based on statutory and federal regulatory amendments, as well as advances and innovations in planning/zoning practices. This Zoning Code Update must complement the Plan Update.

### History & Background

The City of Oak Creek encompasses 28.4 square miles in the southeast part of Milwaukee County. In general, the City’s boundaries are County Highway ZZ (College Avenue) to the north, Racine County to the south, 27<sup>th</sup> Street to the west, and Lake Michigan to the east, though the City of South Milwaukee is located north of Forest Hill Avenue and east of Pennsylvania Avenue. Oak Creek shares its borders with the communities of Franklin, Cudahy, South Milwaukee, Milwaukee, Greenfield, and the Town of Caledonia.

The City of Oak Creek is a rapidly growing, diverse suburban community. Just under one-half of the City’s substantial land base is undeveloped or in permanent open space. Oak Creek’s population has grown from 28,456 persons in 2000 (U.S. Census), to 34,451 in 2010 (U.S. Census)—a 21% increase. Population in 2030 is projected to be 40,596 persons<sup>1</sup>.

Light industrial and manufacturing development in Oak Creek mainly consists of three large industrial parks: Northbranch, Southbranch, and OakView Business Park. As large areas of land have become scarce, newer industrial parks have been much smaller. These smaller parks are generally located adjacent to the larger industrial parks, with access off of 27<sup>th</sup> Street, 13<sup>th</sup> Street, and Howell Ave.

Recent single-family residential development has been predominately in the southern area of the City, with some neighborhoods more than doubling their population between 2000 and 2010. With

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<sup>1</sup> State of Wisconsin Department of Administration Demographic Services Center – “Final Population Projections for Wisconsin Municipalities: 2000-2025”

the majority of open land being located south of Puetz Road, it is anticipated that the southern portion of the City will see more single-family residential growth over the next 10 to 20 years. Recent multi-family development has occurred near the City center area (Drexel Town Square, Centennial Park) as well as along major arterial streets such as E. Drexel Ave., S. Chicago Road, S. 13th Street, and S. 27th Street.

## **SECTION 2: Scope of the Project**

### Expectations

The Plan will guide decisions affecting the physical development and redevelopment within the City. The process for the Plan Update will be critical to its success and must ensure that the final document reflects the desired vision for the community as determined by citizens, developers, landowners, business leaders, appointed and elected officials, and other stakeholders through community participation. The Plan will be a guiding document that reflects the community's unique character and provides a clear process, together with specified objectives and policies, of how the City can build upon its strengths.

The Zoning Code will need to be updated as to ensure conformance with goals and objectives of the Comprehensive Plan, statutes, and federal legislation. While periodic updates to the Zoning Code have been made, a holistic update is required.

### Services

The consultant will provide a full range of municipal planning services required to update the Comprehensive Plan & Zoning Code including, but not necessarily limited to:

1. A thorough evaluation of, and recommendations for, modifications to the existing plan, including its vision statement, goals, objectives, policies and recommendations.
2. An analysis and incorporation of relevant data and trends in conformance with the State of Wisconsin's Smart Growth Law (Wis. Stats. Sec. 66.1001(2)).
3. Recommendations for integration with other plans and initiatives adopted by the City, such as the South 27<sup>th</sup> Street Corridor Plan, the Lakefront Redevelopment Action Plan and related plans, the Park and Open Space Plan, and the City of Oak Creek Strategic Action Plan.
4. Re-evaluation of the Planned Land Use Map and categories, how they function with the existing zoning districts adopted by the City, and any recommendations for potential future zoning districts or district amendments.
5. Evaluation of, and recommendations for, the Growth Pattern Concept Plan (as defined in the 2002 Comprehensive Plan).

6. Identification of opportunities and implementation strategies, and general recommendations on appropriate changes that should be made to the Land Use and Zoning Code to make it consistent with the Plan Update.
7. Effective coordination with staff, the Plan Commission, Community Development Authority, and Common Council. The consultant will assist with the creation of a Comprehensive Plan Update Steering Committee to lead the process.
8. An effective Steering Committee and public participation process and schedule to ensure community involvement in the Plan Update process. Plan Commission and Common Council review meetings, hearings, and adoption date estimates shall also be proposed and updated throughout the process.
9. Final comprehensive plan document preparation and presentation.
10. Identification of opportunities and implementation strategies, and general recommendations on appropriate changes that should be made for consistency with the Plan Update.
11. A thorough evaluation of, and recommendations for, modifications to the existing Zoning Code, including, but not limited to: Zoning Districts; allowed uses; land use controls; incorporation of relevant statutory and federal regulatory mandates, local plans, and planning and zoning practices, trends, and innovations.
12. Effective coordination with staff, the Plan Commission, Community Development Authority, and Common Council. The consultant will assist with the creation of a Zoning Code Update Steering Committee, if applicable, to lead the process.
13. An effective public participation process and schedule to ensure community involvement in the Zoning Code Update process. Plan Commission and Common Council review meetings, hearings, and adoption date estimates shall also be proposed and updated throughout the process.
14. Updated Zoning Code Ordinance and presentation.

These are general requirements for the Plan Update and Zoning Code Update, and are not intended to be a comprehensive list of tasks and deliverables. It is expected that the chosen consultant will provide the City with more specific recommendations for approaches, tasks and deliverables based on their experience and expertise from past work on comprehensive plan projects.

#### Community Involvement in Decision Making

The City of Oak Creek values participation of citizens in every stage of decision making. Participation of citizens, developers, land owners, business owners, second homeowners, appointed and elected officials, and other stakeholders throughout the community is paramount to success of the Plan

Update; therefore, the City will place a strong emphasis in the selection process on choosing a consultant that has strong facilitation skills with respect to the public participation and meeting process. The selected consultant will be responsible for organizing and either leading or co-leading public events with City staff.

### Existing Plans

The Plan Update should coordinate with other plans of the City of Oak Creek, so that all of the plans in the City are mutually supportive and consistent with one another. These plans include:

- S. 27<sup>th</sup> Street Corridor Plan
- Lakefront Redevelopment Action Plan
- 2013 Park & Open Space Plan
- Drexel Town Square Mixed Use Planned Development
- City of Oak Creek Strategic Action Plan
- Chapter 17: Zoning Code

### Products and Deliverables

Some of the deliverables to be included with the Plan Update and Zoning Code Update are expected to be, but not limited to the items below. Other areas of emphasis may be identified during the Plan Update and Zoning Code Update process.

#### Comprehensive Plan Document

A completed Plan Update document that incorporates the required information outlined under the Services subparagraph found in Section 2 of this document. Consultant shall provide one (1) unbound copy and 25 bound copies of the final Plan document to the City, including graphics. The consultant shall also provide (1) electronic submission of the Plan document, including attachments and other graphics, in an editable format commonly used by the Community Development Department.

The City will also require that drafts of the Plan be provided for review at the completion of various key phases of the project. The timing and number of copies to be submitted will be mutually agreed upon between the consultant and City staff as the project moves forward. It should be noted that most City staff and community members are used to accessing electronic documents in Oak Creek, but some paper copies will need to be available.

#### Zoning Code Ordinance

Preparation of updated zoning ordinance that is accurate, complete, understandable, and meets all requirements of planning, zoning, and land use law.

- a. The consultant is being asked to review the current Zoning Code for possible legal issues, inconsistent standards, and recommend amendments to the Code. A summary

is to be provided to the City for review and confirmation of the items that warrant immediate attention. Of those requiring immediate attention, the consultant would work with Planning Division Staff to provide appropriate amendment language.

- b. Complete the revision of the Zoning Code to support the Comprehensive Plan. The revision would include, but not be limited to:
  - i. Administrative aspects of the Zoning Code, including purpose, intent, duties of individual committees and commissions, and enforcement procedures.
  - ii. Permitted uses and uses allowed by a conditional use permit in all zoning districts.
  - iii. Appropriate revision of review procedures for proposed developments.
  - iv. Appropriate revisions of development standards and standards of approval for all development proposals (e.g., site plans, conditional use permits, variances, etc.).
  - v. Revisions and/or addition of graphics and tables.
  - vi. Appropriate revisions of basic rules and regulations, such as setbacks and separation distances; density, lot area and coverage; landscaping, screening and buffering requirements; signage; parking and loading space allocation and driveway dimensions; statutory and federal requirements/limitations; etc.
  - vii. Incorporation of zoning and planning trends and innovations.

### Community Engagement Tools

The chosen consultant will be expected to assist City staff with developing and implementing community engagement tools that should foster public outreach and citizen participation. The City of Oak Creek website should be used in disseminating information related to the Plan Update, while providing avenues for feedback that can be incorporated into the Plan Update and Zoning Code Update. The consultant should also collaborate with City staff to utilize social media to keep the public informed on the Plan Update and Zoning Code Update process. Other public outreach methods should be recommended by the chosen consultant, should implement these outreach efforts or assist City staff with their implementation. In addition, the consultant shall provide assistance to the City with the development of a Comprehensive Plan Update Steering Committee (and Zoning Code Update Committee, if applicable).

### Meetings and Presentations

The consultant is expected to attend key meetings with City staff, citizens, developers, land owners, business leaders, appointed and elected officials, and other stakeholders. The consultant will prepare and conduct key presentations as appropriate. The City is equipped to conduct virtual meetings with the consultant when appropriate to save travel time and expense.

### GIS Data

Relevant GIS data and digital map documents used in the creation of maps and other supporting documentation in the Plan and Zoning Code Updates shall be provided to the City at the end of the project. GIS data formats and standards shall be created in consultation with Oak Creek's GIS team to ensure the data can be used later in City operations. Relevant metadata, if applicable, shall be created and provided to the City as well.

## **SECTION 3: Proposal Requirements**

### Proposal Submission Requirements

1. One (1) unbound original proposal.
2. Eight (8) printed and bound copies of the proposal.
3. One (1) digital copy of the proposal.

Digital copies may be submitted via email (max. 2 MB file size), on a flash/thumb drive, or via FTP/Dropbox link. The deadline to submit proposals is **Friday, December 1, 2017 before 4:00 PM.**

The proposal submittal should be submitted in an envelope labeled “2018 Comprehensive Plan and Zoning Code Update Proposal” and delivered to:

Doug Seymour, Director of Community Development  
City of Oak Creek  
Community Development Department  
8040 S. 6<sup>th</sup> Street  
Oak Creek, WI 53154

### Proposal Format

Proposals should contain the following information:

1. Title Page. Provide the name of your firm, address, telephone and name of contact person on a title page.
2. Letter of Transmittal. Provide a complete statement regarding the understanding of the project and your interest in working with the City of Oak Creek on the Comprehensive Plan and Zoning Code Updates. The transmittal letter shall be signed by a duly authorized officer or agent empowered with the right to bind the consultant submitting a proposal for consideration.
3. Firm Background. Provide information on the size, location, available resources and brief discussion on past experiences related to updating comprehensive plans, transportation plans, workforce housing, zoning codes, and other policy documents.
4. Project Team. Identify the project team (including sub-consultants and associates) and provide a statement of qualifications for each individual.
5. Work Samples. List and provide in electronic format only (either a webpage link to the document or other electronic format) three (3) examples of comprehensive plans, zoning codes, or other applicable writing samples recently completed by the firm or team members.

6. Methodology and Approach. Provide a description of the method and approach your firm intends to utilize in order to complete the Comprehensive Plan and Zoning Code Updates.
7. Timeframe. Include a detailed phasing and task list and estimated completion time of each task. Provide an estimated start date and completion date of the Comprehensive Plan Update and Zoning Code Update, based on an estimated consultant selection date of late February 2018.
8. References. Submit names, e-mails and telephone numbers of other municipal officials that we may contact to verify performance on projects recently completed by the firm as identified under the Firm Background section of the proposal submittal.
9. Verify Firm Capacity and Project Team. Provide a statement verifying your ability to begin work on the Comprehensive Plan and Zoning Code Updates, and complete the tasks within the timeframes identified in the Methodology and Approach section of the submitted proposal based on your firm's current work load and capacity. Provide a list of the person(s) that will be principally involved in the project.
10. Cost Breakdown. Submit a not-to-exceed cost breakdown of the Comprehensive Plan and Zoning Code Update process, including total travel and material expenses as separate line items, for the work identified by the consultant in the Methodology and Approach and Timeframe sections of the proposal submittal.
11. Supporting Information (Optional). Provide other supporting information you feel may help us further evaluate firm qualifications and fit for completing the Comprehensive Plan and Zoning Code Updates.

## Tentative Schedule

The tentative schedule for this Request for Proposals is as follows:

- Release of RFP: October 20, 2017
- MANDATORY RFP Preplan Meeting: November 8, 2017
- Deadline for Questions: November 10, 2017
- Question Responses and/or Addenda to RFP: November 17, 2017 by 4:00 PM
- Proposal Submission Deadline: December 1, 2017 at 4:00 PM
- Selection Committee Reviews Complete: January 12, 2018
- Schedule Consultant Interviews: January 23-25, 2018
- Selection of Preferred Consultant: February 20, 2018 (Common Council meeting)
- Notice to Preferred Consultant: February 21, 2018

## Questions

There will be a mandatory meeting at City Hall on November 8, 2017, at 10 a.m. All questions received at the meeting will receive written response and distributed to all RFP holders by 4 p.m. on November 17, 2017. The deadline for questions regarding the proposal is November 10, 2017. Questions can be directed to Kari Papelbon, City Planner, by e-mail only at [kpapelbon@oakcreekwi.org](mailto:kpapelbon@oakcreekwi.org). Responses to questions and/or addenda determined to be required by City staff to further clarify this RFP will be posted to the City's RFP webpage <http://www.oakcreekwi.org/contracts> no later than November 17, 2017 at 4:00 PM.

## **SECTION 4: Evaluation and Consultant Selection**

### Selection Process

The City will follow the process below to select the consultant for the Plan Update and Zoning Code Update:

1. Each proposal submitted within the deadline will be reviewed to ensure whether all required materials have been submitted according to the guidelines set forth in this RFP. All proposals that do not meet minimum requirements will be rejected.
2. A review group will be assembled to serve as the Comprehensive Plan Update/Zoning Code Update Selection Committee, and will review the submitted RFPs based on predetermined Evaluation Criteria below. The qualifications of each consultant and all submitted materials will be evaluated for compliance with the requirements and conditions contained in this RFP.
3. After the Comprehensive Plan Update/Zoning Code Update Selection Committee completes its evaluation of the submitted proposals, consultants will be selected to take part in an interview process. This interview process will include a brief presentation by the consultant, and a question-and-answer session led by the Comprehensive Plan Update/Zoning Code Update Selection Committee. All costs related to the interview process will be the responsibility of the consultants being interviewed.
4. The Comprehensive Plan Update/Zoning Code Update Selection Committee will be responsible for selecting the consultant. The City reserves the right to modify the scope of the project as necessary to fit the needs of the community.

### Evaluation Criteria

1. Project Team Qualifications and Experience
2. Proposed Methodology and Approach
3. Understanding of the City of Oak Creek
4. Timeframe and Completion Date

## 5. Proposed Fees and Costs

### **SECTION 5: Additional Information**

#### Consulting Agreement

A consulting agreement in a form provided by the City shall be executed by the City Administrator and a duly authorized officer or agent of the chosen consultant prior to commencing any work related to the Plan Update or any other work requested in this RFP. Minor changes that do not affect the substance of the agreement provided may be considered prior to finalizing the agreement.

#### Insurance

The consultant chosen by the City to perform the Plan Update and Zoning Code Update shall provide City with a certificate of insurance naming the City, including the Common Council, employees and agents, as additional insured with an insurance company, types of coverage, and amounts of coverage that are acceptable to the City.

#### Acceptance of Terms

Submission of a proposal indicates acceptance by the consultant of conditions contained in this Request for Proposals. Note that all proposal submissions are subject to State and Federal open records laws.

#### Reference Materials

Additional information about the City of Oak Creek is provided at the following website:

<http://www.oakcreekwi.org/your-government/departments/community-development/>

- 2020 Comprehensive Plan
- Drexel Town Square Mixed Use Planned Development
- Park and Open Space Plan
- Lakefront Redevelopment Action Plan
- Chapter 17: Zoning Code
- 2017 Strategic Plan
- Video Tour of Oak Creek
- Citizen Engagement and Priority Assessment Report