City of Fort Atkinson
City Manager's Office
101 N. Main Street
Fort Atkinson, WI 53538

City of Fort Atkinson
Request for Proposals (RFP)
Strategic Planning Facilitation Services

Issue Date: July 22, 2026
Due Date: August 19, 2026

Contact:
Rebecca Houseman, City Manager
rhouseman@fortatkinsonwi.gov
920-397-9901

I. BACKGROUND AND SUMMARY

The City of Fort Atkinson is a vibrant and growing community located along the Rock River, a few miles upstream from Lake Koshkonong, in Jefferson County, Wisconsin. Fort Atkinson is the largest City located entirely in Jefferson County. According to 2025 U.S. Census Bureau estimates, the population of Fort Atkinson is 12,388.

The City has 14 departments with approximately 100 full-time employees, various part-time staff across departments, 20 unionized police officers and 12 unionized firefighters.

The City operates under the Council-Manager form of government. The City Manager is appointed by the City Council; oversees the day-to-day operations of the City as the chief Executive Officer; and serves as the City Council's chief advisor.

The City of Fort Atkinson (the "City") invites proposals from qualified consultants to facilitate the development of a comprehensive citywide Strategic Plan. The Plan will guide City operations, resource allocation, and community investment over a three- to five-year horizon.

The City seeks a consultant with proven expertise in municipal strategic planning, demonstrated skill in engaging elected officials, staff, and the public, and the ability to produce a practical, measurable plan that the City Council can adopt and staff can implement.

The City does not currently have a Strategic Plan and instead relies on the Comprehensive Plan, adopted in 2019 and amended in 2023 to guide the City's planning efforts.

II. PROJECT SCOPE

The City Council wishes to engage a professional consultant to facilitate the development of a new five-year Strategic Plan to guide the City's policy priorities and budget allocations. The following activities are anticipated to be part of this engagement:

a. Initial meetings with the City Manager and Department Directors to conduct an organizational assessment and review existing plans, policies, and prior planning documents.
b. Facilitation of at least one community or stakeholder engagement session to gather input from residents, businesses, and other community stakeholders. Engagement may be conducted in person, online, or through a combination of both methods.
c. Facilitation of a Strategic Planning workshop with the City Manager, Department Directors, and the City Council.
d. Preparation of a draft Strategic Plan for City review and comment.
e. Preparation of a final Strategic Plan, including an executive summary suitable for public distribution.
f. An implementation guide and monitoring framework with recommended performance measures and a suggested annual review process.
g. A presentation of the final plan to the City Council at a regular or special meeting.

The City anticipates the engagement will include, at a minimum, a SWOT analysis, identification of short and long-term goals and objectives, and consideration of fiscal constraints and opportunities

relevant to achieving those goals. Consultants are encouraged to propose methodologies they believe will produce a stronger or more durable plan, provided the core analytical elements are addressed.

III. PROJECT COST AND TIMELINE

Proposers must provide the total cost for City of Fort Atkinson Strategic Planning Services. Please provide this in a not-to-exceed format, including hourly rates and fees.

Timeline. The City anticipates the following schedule. Proposers should indicate any recommended adjustments.

Target Date	Milestone
July 22, 2026	RFP Issued
July 31, 2026	Deadline for Written Questions
August 5, 2026	Addendum Issued (if applicable)
August 19, 2026	Proposals Due
Week of August 24, 2026	Interviews with Finalists (if conducted)
September 1, 2026	Anticipated Contract Award
September 2026	Project Kickoff*
September 2026	Community, Council, Staff Engagement
November 2026	Draft Strategic Plan Delivered
December 2026	Final Plan Delivered and Council Adoption

*Project timeline subject to change due to consultant and stakeholder availability.

IV. QUALIFICATIONS

Minimum Qualifications. Proposals that do not satisfy all minimum qualifications will be deemed non-responsive and will not be evaluated further.

a. Evidence of substantial knowledge and experience in developing and facilitating strategic planning processes for local government entities.
b. At least three completed municipal strategic planning engagements within the past seven years.
c. Demonstrated use of data-driven performance measurement frameworks.
d. The lead consultant(s) responsible for managing the engagement must be identified in the proposal. Any proposed subcontractors must also be identified.
e. The proposer must be in good standing to conduct business in Wisconsin and must be able to provide required insurance coverage prior to contract execution.

V. PROPOSAL REQUIREMENTS

Required Proposal Components

a. Cover Letter and Executive Summary
   1. One-to-two-page letter signed by an authorized representative of the firm.

2. A summary of the proposer's qualifications and approach.
3. Confirmation that the proposer has read and agrees to the terms of this RFP.

b. Firm Qualifications and Experience
   1. Firm history, size, and organizational structure.
   2. Description of at least three comparable municipal strategic planning engagements completed within the past seven years, including client name, project dates, scope, and a current client contact.
   3. Identification of any proposed subcontractors, their roles, and their qualifications.

c. Project Approach and Work Plan
   1. Detailed description of the proposed methodology for each phase.
   2. Proposed timeline with key milestones.
   3. Description of quality control procedures.
   4. Description of proposed stakeholder and community engagement methods.

d. Personnel
   1. Resumes for the lead consultant and any key project personnel.
   2. Identification of the primary contact and project manager.
   3. Statement of personnel availability and commitment to the project timeline.

e. Fee Proposal
   1. Total not-to-exceed fee for all services described in the proposal.
   2. Itemized cost breakdown by task or deliverable.
   3. Identification of any assumptions, exclusions, or optional services and associated costs.
   4. Hourly rates for all services and for any additional services that may be billed outside the not-to-exceed amount.

f. References
   1. Minimum of three professional references from municipal clients for comparable engagements.
   2. Include client name, project description, dates, and current contact information.

g. Sample Contract. A sample professional services agreement representative of the terms under which the proposer typically conducts engagements of this type. The City will use this as a reference in contract negotiations and is not obligated to adopt the proposer's form.

h. Proposer Certification and Price Proposal. The proposer must include all information required by this RFP, clearly identified, with an authorized signature on the certification.

Submission Instructions. Proposals must be submitted no later than **August 19, 2026, at 4:00 p.m. CST**. Late proposals will not be accepted under any circumstances.

Submit proposals in PDF format by email to Sarah Weihert sweihert@fortatkinsonwi.gov. The subject line must read: "RFP — Strategic Planning — [Firm Name]."

Proposals submitted after the deadline or missing required components may be rejected.

Questions and Addenda. All questions must be submitted in writing to Rebecca Houseman at rhouseman@fortatkinsonwi.gov by July 31, 2026, at 12:00 p.m. CST. The City will not respond to oral inquiries. Questions and answers will be distributed to all proposers via the addendum. The City reserves the right to issue addenda modifying any part of this RFP. Proposers are responsible for checking for addenda prior to submission.

VI. EVALUATION AND SELECTION

Evaluation. The City will evaluate responsive proposals using the weighted criteria below. The City reserves the right to conduct interviews with finalists prior to final selection.

Evaluation Criteria	Weight	What the City Will Assess
Qualifications and Experience	30%	Depth and relevance of municipal strategic planning experience; comparable projects; team credentials.
Project Approach and Methodology	30%	Quality, clarity, and practicality of the proposed methodology; responsiveness to scope; stakeholder engagement strategy.
Personnel	15%	Qualifications of lead consultant and key staff; continuity and availability commitments.
References	10%	Quality and relevance of client references; demonstrated outcomes.
Fee Proposal	15%	Total cost relative to scope; clarity of cost breakdown; value for investment.
TOTAL	100%	

The final award will be based on a best value concept. The City will consider the entire proposal for, but not limited to, proposal completeness, ability to meet requested service needs, experience in conducting strategic plan facilitation and development, expertise and availability of key personnel, cost to the City, and satisfaction of other clients.

Selection Process.

a. City staff will review all proposals for minimum qualifications and completeness. Proposals that do not meet minimum qualifications will be deemed non-responsive and will not be evaluated further.

b. Responsive proposals will be evaluated and scored by City staff using the criteria.

c. The City Council will select the successful proposer. Contract award is subject to execution of a Professional Services Agreement in a form acceptable to the City.

VII. PROPOSER CERTIFICATION AND PRICE PROPOSAL

Proposer Certification. By submitting this proposal, the authorized representative of the firm certifies that:

a. The firm is fully qualified to perform the services described in this RFP.
b. All information contained in this proposal is accurate and complete.
c. The firm has read and agrees to the terms of this RFP.

Price Proposal

All costs related to travel, supplies, printing, and other expenses must be included in the total not-to-exceed fee. No additional costs will be reimbursed unless expressly authorized in writing by the City prior to the expense being incurred.

Item	Cost
Phase 1 — Organizational Assessment and Discovery	$
Phase 2 — Community and Stakeholder Engagement	$
Phase 3 — Strategic Plan Development	$
Phase 4 — Finalization, Council Presentation, and Adoption	$
TOTAL NOT-TO-EXCEED FEE	**$**

Hourly rates of key personnel, including extra services:

Personnel Classification	Hourly Rate
	$
	$

VIII. CONTRACT TERMS AND CONDITIONS

Contract Form. The selected proposer will be required to execute a Professional Services Agreement with the City. The City will use the proposer's sample contract as a reference in negotiations but is not obligated to adopt the proposer's form.

Insurance Requirements. The selected Proposer(s) must meet the City of Fort Atkinson's Insurance Requirements.

Wisconsin Public Records Law. All proposals submitted in response to this RFP are subject to disclosure under the Wisconsin Public Records Law (Wis. Stat. § 19.31 et seq.). Proposers should not submit information they consider proprietary or confidential unless clearly marked as such. The City will evaluate such designations but cannot guarantee confidentiality of any submitted materials.

Non-Discrimination. The City of Fort Atkinson is an Equal Opportunity employer and requires all contractors to comply with applicable federal and state non-discrimination laws in performance of any contract awarded under this RFP.

No Contract Until Executed. Issuance of this RFP does not commit the City to award a contract, pay any costs incurred in proposal preparation, or proceed with the engagement. No contract is binding until fully executed by authorized representatives of both parties.

Right to Negotiate and Reject. The City reserves the right to negotiate contract terms, scope, and fee with the selected proposer prior to presenting a contract to the City Council for approval. The City also reserves the right to reject any or all proposals, to waive informalities, and to make the award it determines to be in the best interest of the City.