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

City of Fort Atkinson
Strategic Planning Facilitation Services
Questions & Answers
Issued August 5, 2026

1. On-site expectations. Of the anticipated activities (initial meetings with the City Manager and directors, the community and stakeholder session, the Council and staff workshop, and the final Council presentation), which does the City expect to be conducted in person versus remotely?

The community and stakeholder session, the Council/staff workshop, and the final Council presentation are expected to be in person.

2. Insurance. Could you share the City's specific insurance requirements (coverage types and limits) referenced in Section VIII, so we can confirm compliance ahead of submission?

General Liability insurance at $100,000/$300,000 is required.

3. Community engagement. Beyond the one required session, what depth and reach of public engagement does the City envision, and who would be responsible for logistics such as venue, notification, promotion, contact lists, and any online survey tools?

Engagement beyond the session would be something that the consultant recommends in the proposal. The City has venues to use for such engagements for free and would assist in promotion and contact lists. The City does not currently have online survey tools.

4. Existing plans. How does the City see the new Strategic Plan relating to the 2019 Comprehensive Plan (amended 2023)?

These plans should align, with the understanding that the Comprehensive Plan will likely be amended in 2027 or 2028.

5. Foundational elements. Does the City have a current mission, vision, and values statement, or is developing those within the scope of this engagement?

Development of the mission, vision, and values should be included in this engagement.

6. Performance measurement. What performance data or measurement capacity currently exists to support the implementation guide and monitoring framework described in Section II(f)?

None.

7. Participants. Approximately how many department directors and Council members will take part in the strategic planning workshop?

City Council – 5

Management Team - 14

8. Timeline. The RFP invites recommended schedule adjustments. Is the December 2026 target for final plan delivery and Council adoption firm, or is there flexibility if the scope warrants it?

There is flexibility in timeline.

9. Has the City established a budget range for this project and, if so, can it be shared with proposers?

The budget for this project is $50,000.

10. Is the December 2026 adoption target firm, or is the City open to extending the timeline if additional stakeholder and community engagement activities are recommended?

The timeline is flexible.

11. Beyond the Comprehensive Plan, what other plans, studies, master plans, facility plans, economic development plans, housing plans, parks plans, or capital improvement plans should be considered during development of the Strategic Plan?

The City has a Comprehensive Outdoor Recreation Plan, a Downtown Corridor Plan, a Janesville Avenue Corridor Plan, a recent retail market study, and a recent housing report to consider along with the strategic planning process.

12. Has the City previously undertaken a strategic planning or similar initiative? If so, what worked well and what improvements would the City like to see in this effort?

This will be the City's first effort at strategic planning.

13. Does the City anticipate stakeholder engagement beyond the minimum community/stakeholder session identified in the RFP? If so, approximately how many stakeholder groups does the City expect to participate?

There is flexibility here depending on the recommendations of the consultant. The minimum stakeholder engagement expectations are included in the RFP.

14. Does the City have a list of community stakeholders, business leaders, partner organizations, boards, commissions, and community groups that should be engaged as part of this process?

The City can assist with a list of such stakeholders.

15. Has the City conducted a community satisfaction survey, citizen survey, employee engagement survey, or organizational assessment within the past five years that can be shared with proposers?

The retail market study (linked above) includes some survey data from residents.

16. Does the City anticipate forming a steering committee or project advisory group to guide the development of the Strategic Plan?

No.

17. What systems or processes currently exist for tracking strategic initiatives, key performance indicators, organizational goals, or department performance measures?

None. However, staff anticipates integrating the Strategic Plan into the annual budget document, capital improvements plan, and performance management process.

18. The pricing proposal form identifies four phases: Organizational Assessment and Discovery, Community and Stakeholder Engagement, Strategic Plan Development, and Finalization/Council Presentation/Adoption. Are these intended to be the exact project phases, or may proposers recommend alternative phase structures and methodologies?

Alternative phase structures and methodologies are encouraged.

19. Would the City consider inclusion of a separate Phase 0 focused on project initiation, project management, communications planning, and kickoff activities?

Yes.

20. Does the City anticipate future implementation support, action planning, performance management development, or annual strategic plan update services beyond adoption of the Strategic Plan?

Not anticipated, but would be considered depending on cost and complexity.

21. Is there an expected format, length, or graphic design requirement for the final Strategic Plan and executive summary?

Not beyond the information provided in the RFP.

22. Are there any upcoming community initiatives, development projects, budget priorities, organizational changes, or Council priorities that should be incorporated into the strategic planning process?

The stakeholders are relatively stable. The City is seeing more interest from developers in multifamily housing and continues to encourage development and economic growth through the creation of several new Tax Increment Districts in 2026.

23. In Section V. Proposal Requirements, b. Firm Qualifications and Experience, the City requests, "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." In f. References, the City requests, "1. Minimum of three professional references from municipal clients for comparable engagements." and "2. Include client name, project description, dates, and current contact information." Are there any differences in the kind of projects or information the City wants in section b 2. versus section f?

No, these previous engagements and references may be the same organizations or individuals representing organizations.

24. Is Section VII. Proposer Certification and Price Proposal intended to be a separate form for submittal in section h. Proposer Certification and Price Proposal? As it is in the RFP, it does not have a signature line, and text from other sections are currently on the page. If Section VII is not intended to be a form to be used for section h., then what information does the City want for section h. and how does the City want that information to be formatted?

Proposers are free to use the form on page 6 as the price proposal form. It does not have to be submitted independently from the rest of the proposal. Cost will be a factor in review, but it will not be the only factor per the evaluation criteria on page 5.

25. Does the City want the tables from Section VII in the Fee Proposal section?

Using the same or similar format to those tables will assist in efficient review of pricing proposals.

26. What should be in the Fee Proposal section versus the Proposer Certification and Price Proposal section?

The Proposer Certification and the Price Proposal section should be completed. A separate fee proposal is not required.

27. I read through the proposed 2026-2031 budget and did not see a line item for the strategic planning services. Does the city have a budget for this service and if so, what is it

The City budgeted $50,000 in the 2026 CIP for this project.

28. Can you provide any additional context as to why the city is interested in hiring a firm for a strategic plan - are there challenges the city has faced that should be addressed in our proposal so we can engage proactively instead of reactively?

The City has never developed a strategic plan before and will need assistance in education as to what it is and what it is not. I described this effort to the Council as making sure that we are rowing in the same direction. I believe this effort is needed for staff to make sure that they are providing the services that the City Council and public want and expect. I hope the process results in a shared mission, vision, and values that can be referenced for projects and budgeting purposes. There are no significant challenges right now among the City Council or staff, aside from the usual social media negativity.

29. Is the city looking for a facilitative retreat-style process or implementation planning process?

We are looking for a proposal that allows input and feedback from the City Council, City staff, stakeholders, and members of the public. We are looking for enough input that the overall values of the community rise to the top and are not dominated by a person or a group with a specific outcome in mind. A retreat is probably not realistic for the Council or staff, but stakeholder meetings and focus groups could help the planning process. I don't have a background in strategic planning, so I am looking for a consultant with experience to facilitate and advise.

30. Has the City established a budget range or anticipated funding level for this project that proposers should consider when developing their scope and fee proposal?

The budget for this project is $50,000.

31. Approximately how many City Council members, department directors, staff members, and community stakeholders does the City anticipate participating throughout the strategic planning process, including workshops and engagement sessions?

There are 5 City Council members and 14 members of the management team. I don't have a number for other staff members and community stakeholders, but I would want at least 1 public engagement session where any resident or property owner could attend and participate.

32. What are the City Council's primary objectives for this effort, and are there any specific organizational, operational, financial, or community challenges that the City hopes the Strategic Plan will address?

See 28 above.

33. Do you want the strategic planning for this process to be done primarily by the City Manager, Department Directors, and City Council?

Yes, but the City desires public engagement through meetings or focus groups.

34. The RFP states that the selected proposer must be in good standing to conduct business in Wisconsin. Can you clarify whether an out-of-state firm must register with the State of Wisconsin prior to submitting a proposal, or if registration is only required after contract award and before contract execution?

An out of state firm does not have to register with the State of Wisconsin prior to submitting a proposal.

END