



## **Request For Interest**

### **Consultant for Milwaukee County Strategic Planning**

**Milwaukee County  
Department of Administrative Services**

**Issuance Date:  
January 4, 2008**

**Due Date:  
February 1, 2008**

# **Request For Interest Strategic Planning Consultant**

## **PURPOSE**

Milwaukee County (“County”) is initiating a new strategic planning process that is designed to develop strategic goals and priorities for Milwaukee County government for the next five years and that potentially could include an action plan to accomplish those goals and reflect those priorities. The County’s 2008 Budget appropriates \$40,000 in the Department of Administrative Services-Fiscal Affairs Division for consulting assistance to be used for Long-Range Strategic Planning. This assistance shall specifically be utilized to assist a newly formed Strategic Planning Operations Team that is comprised of senior officials from the Executive and Legislative Branches of County Government. That Team has been charged with the task of reviewing recent County strategic planning efforts and making recommendations to elected officials on a new structure and framework for a strategic planning process that will include defining core County services, and ranking and prioritizing those services so that difficult budget decisions can be made in the context of the County’s overall strategic priorities and mission.

## **BACKGROUND**

In the late 1990s, Milwaukee County government embarked upon an effort to conduct countywide strategic planning as part of a strategy for addressing longstanding fiscal problems that called into question the County’s ability to continue to provide and/or properly fund its existing array of services and that suggested the need to prioritize those services. A Long-Range Strategic Plan Steering Committee appointed by the County Executive and County Board Chairman provided overall direction and structure to the County’s strategic planning process. With the assistance of a consultant, the Steering Committee initiated a planning process that involved county employees, key stakeholders and interested community representatives. In September 1999, the County Board approved a strategic planning document forwarded by the Long-Range Strategic Plan Steering Committee entitled “*Charting the Course: Milwaukee County’s Goals, Strategies and Actions*”. *Charting the Course* included a mission, vision, guiding principles and priority outcomes.

Per *Charting the Course*, in 2000, the County devoted considerable focus towards Outcome Based Services. Outcomes, indicators and targets were developed for each county department and included in the 2001 Adopted Budget. The process of setting priorities was begun in January 2000 with the establishment of Functional Groups as prescribed in *Charting the Course*. The five Functional Groups were Parks, Recreation and Culture, Public Works and Transportation, County Support Services, Health and Human Services and Public Safety and Judiciary. These groups were designed to play an ongoing key role in Milwaukee County’s Strategic Planning and Managing for Results efforts. In April 2001, the Steering Committee forwarded a set of Priority Goals for 2002-2004 to the County Board, which were modified and adopted.

The *Charting the Course* initiative stalled in 2002 primarily due to the significant political and administrative leadership changes resulting from the pension controversy. The loss of key training staff due to reorganization and retirements also slowed the momentum that the initiative had built in late 2001. Both the County Executive (via his 2008 Recommended Budget) and the County Board (via Resolution) have now indicated a desire to re-start the strategic planning process.

## **PROJECT**

A strategic planning consultant is being sought by Milwaukee County to assist top government officials in a) establishing a planning process and framework that will lead to the development of, at minimum, a set of strategic goals and priorities for the County for the next five years; and b) coordinating that planning process during 2008. A rationale for use of consultant resources was included in a July 2007 report from the County's directors of Administrative Services and Audit and its County Board Fiscal and Budget Analyst:

*The likelihood of (strategic planning) success is enhanced when outside consulting resources are coupled with dedicated in-house resources. Milwaukee County's prior efforts blended a mix of external and internal expertise in a way that drew on strengths and talent in the community and within County government. At that time, external resources were also essential in allowing County staff to manage daily workload. The condition of Milwaukee County government today is such that external resources will be even more critical than they were before.*

## **SCOPE OF SERVICES**

The strategic planning consultant will be expected to work with the Strategic Planning Operations Team to develop and manage the planning process, design and implement mechanisms for achieving planning objectives, secure and coordinate the participation of internal and external stakeholders, assess current County strategic planning practices, synthesize recommended strategies and prepare and disseminate strategic planning written materials.

## **PROCESS**

### Intention

This RFI is intended to provide the Strategic Planning Operations Team with a list of potential consultants that it will deem competent and appropriate to perform the consulting tasks outlined above. The Operations Team will interview a limited number of consultants before selecting one per County procurement regulations. The County shall not consider RFI submissions to be binding.

### Submission

To be considered responsive to this RFI, Respondents are urged to submit a letter of interest to the County that includes, at minimum, the following information:

- General company information.
- Demonstration of the Respondent's strategic planning experience, including any experience in strategic planning involving governmental entities.
- Proposed project vision, including strategies for involving both internal and external stakeholders.
- Reasons why the Respondent is interested in taking on this critical County project and reasons why the Respondent believes he or she would be successful.

#### Due Date

The letter of interest and any attachments must be submitted to the individual listed below (under Contact Information) and received no later than 4:00 p.m., on **February 1, 2008**. Any cost incurred in responding to this RFI is borne solely by the Respondent.

#### Contact Information

Please address all correspondence and requests to the following individual:

Mary Reddin, Deputy Director  
Information Management Services Division  
Milwaukee County  
Phone: 414.278.3978  
E-mail: mreddin@milwcnty.com

Milwaukee County Courthouse  
901 N. 9<sup>th</sup> Street  
Milwaukee, Wisconsin 53233  
Fax: 414.223.1289

#### Post-Submittal

The County will review RFI submissions and conduct interviews with Respondents if appropriate.

#### Disclaimer

**This RFI in no manner obligates the County to pursue any contractual relationship with an entity that responds to this RFI. The County further reserves the right to cancel this RFI at any time if deemed to be in the best interest of the County.**