



REQUEST FOR PROPOSAL

Strategic Planning Facilitation Services

The Lake Michigan Air Directors Consortium (LADCO) is seeking a qualified facilitator to support a strategic planning process for the Wisconsin Department of Natural Resources (WI DNR) Air Management Program's leadership team. The purpose of this engagement is to help the leadership team examine where the Program stands today, define where it needs to be over the next 8 to 10 years, and identify the changes needed to get there through a more holistic planning approach.

This is a facilitation engagement, not a plan-development engagement. The selected facilitator will guide the process and structure the conversations. The WI DNR Air Program's leadership team will develop the substantive content of the strategic plan.

Proposal Requirements

Proposals must be received no later than 5 p.m. Central on September 25, 2026. An electronic PDF copy of the proposal is required and should be sent to:

Zac Adelman
Executive Director
Lake Michigan Air Directors Consortium
adelman@ladco.org

No late proposals will be accepted, and the offer shall remain effective for a period of 60 days from the date of the submission.

Your response to this Request for Proposal (RFP) should include a complete technical proposal that describes your approach for accomplishing the activities outlined below in the Scope of Work. The technical proposal should clearly describe your proposed facilitation approach, schedule, and deliverables. The technical proposal should include a summary of your capabilities and your experience in the field of work. Your response to this RFP should also include a complete cost proposal with a detailed breakdown of projected expenditures by task, including person hours and other direct charges, including estimated travel costs.

As part of the technical proposal, respondents must include a signed statement affirming they have reviewed [WI DOA 3054](#) and agree to its terms as a condition of contract award, or, if

exceptions are taken, a list identifying each specific term and the requested modification. LADCO cannot consider proposals that do not address this requirement.

Please limit the proposal to 10 pages (single-spaced, 12-point font).

In addition, your response may include an appendix with supplemental information, such as references, resumes, and descriptions of recent relevant work. The supplemental information has no page limit.

General Terms

This contract will be issued by LADCO and managed by LADCO's Executive Director. It is anticipated that LADCO will award a fixed price contract but may consider awarding another type of contract, provided that its use is consistent with the objectives and interests of the Consortium.

Details of the LADCO procurement process, including draft contract terms, are available in the [LADCO Procurement Policy Manual](#).

LADCO reserves the right to reject any or all proposals, to waive minor informalities or irregularities in any proposal, to request clarification or additional information from any respondent, and to cancel this solicitation at any time, without obligation or liability to any respondent.

Funds available for this contract are state funds from the Wisconsin Department of Natural Resources (WI DNR) and contractors must meet requirements associated with the Standard Terms and Conditions ([WI DOA 3054](#)) of LADCO's agreement with WI DNR.

The selected facilitator must maintain commercial general liability insurance and professional liability (errors and omissions) insurance in amounts consistent with WI DNR facility access requirements, and must provide a certificate of insurance prior to on-site work at WI DNR offices in Madison, WI.

Payment will be made upon completion and LADCO's acceptance of each phase's deliverables, net 30 days from invoice. Travel and other direct charges will be reimbursed at actual cost, consistent with WI DOA 3054, upon submission of supporting documentation.

LADCO will make positive efforts to utilize small, minority business enterprises (MBE), women's business enterprises (WBE), and disadvantaged business enterprises (DBE), whenever possible.

All deliverables produced under this engagement, including but not limited to memos, meeting materials, and facilitator notes, will become the property of LADCO upon delivery, and LADCO will retain unrestricted rights to use, reproduce, and distribute them for program purposes.

All inquiries regarding this RFP should be directed to Zac Adelman (adelman@ladco.org) no later than 5 p.m. Central on September 14, 2026. LADCO will post responses to all received inquiries to the [LADCO website RFPs page](#) by September 16, 2026.

We expect to award the project and enter a contract with the winning bidder by October 7, 2026. We would like the project to begin during the week of October 19.

If your organization would like to be included on the interested bidders list for this and subsequent work, then please send an email to the LADCO Executive Director with your email address and contact information.

Scope of Work

Introduction

The Wisconsin Department of Natural Resources (WI DNR) Air Management leadership team seeks to undertake focused strategic planning to consider the Air Management Program's future direction. The goal is to arrive at a well-prepared, informed conversation among management team members culminating in a two-day strategic planning session in February 2027.

The WI DNR Air Management Program has been significantly underfunded and has been operating in a structural deficit in all major program revenue accounts for several years. These account shortfalls directly impact the Program's ability to issue air permits, do compliance activities, write rules, and provide customer service and assistance. Indirectly, the budget issues have had a major impact across the Program among topics like staff vacancy filling, future planning, and strategic direction. While the Program has remedied some of its revenue issues, Program management seeks strategic planning assistance both for the future without new funding and with new funding. It is expected that planning around Program structure, new topic areas, and new ways to bring in funding will be needed.

Project Phases

The engagement has three phases:

- Discover: October - November 2026
- Pre-Meeting Preparation: January 2027
- Facilitated Planning Session: February 2027

Details of the project phases, including deliverables for each phase, are described below.

Phase 1: Discovery

The facilitator will participate in up to four virtual meetings with the WI DNR Air Program Director during October and November 2026. The purpose of the sessions is for the facilitator to develop a working understanding of the program, its structure, and its current challenges. These sessions are preparatory between the facilitator and Air Program Director and will not involve the broader management team, but may include a select participant or two from the management team based on topic areas.

Phase 1 Deliverables:

- Proposed approach and design of the October and November discovery and February planning meeting facilitation sessions.
- Four x 2 hour discovery meetings via Teams or Zoom during October and November 2026
- Memo summarizing the current state of the WI DNR Air Management program, priorities and challenges of the program now and over the next 10 years, and ideas for how to maximize the internal strategy meeting planning process (Phase 2) including preparation and facilitation methods to facilitate preparation and engagement.

Phase 2: Pre-Meeting Preparation

Following an internal preparation period through December 2026, during which the Air Program management team will independently work on strategic planning meeting items, the facilitator will meet virtually with the Air Program Director up to two times in January 2027 to review progress and finalize the structure and objectives of the February meeting. The purpose of this phase of the project is to support the program Director in the design of a meeting agenda and format that will best support the goals of the strategic planning process.

Phase 2 Deliverables:

- Two x 2 hour meetings via Teams or Zoom during January 2027 to finalize the agenda, format, and objectives for the February planning session.

Phase 3: Facilitated Planning Session

The goal of this engagement is to design and support a two-day strategic planning meeting with the full WI DNR Air Program management team to take place at the WI DNR offices in Madison, WI in February 2027. During Phase 3 of the project the facilitator will lead a meeting kick-off session to set the stage for the strategy work. The facilitator will participate in the first half-day (approximately 4 hours) of the meeting to lead the WI DNR Air Program management team through framing the strategic planning conversation, establishing the working structure for the remainder of the meeting, and defining the desired outcomes and decision points the team will carry into the remaining one and one-half days.

As an optional task, the contractor will help facilitate the remaining one and one-half days of the strategy meeting. It is during this part of the meeting that the WI DNR management team will engage in strategic planning and synthesize the meeting outcomes into elements that will be used to develop a strategic plan for the air program. The facilitator's presence for this

portion is not required, but a separate cost estimate for continued facilitation support for this period is being requested.

Phase 3 Deliverables:

- Preparation for and participation in a 4-hour kick-off and framing session at the WI DNR Air Program strategy meeting in Madison, WI in February 2027
- (Optional) Facilitation of the remaining one and one-half day WI DNR Air Program strategy meeting in Madison, WI in February 2027

Level of Effort and Project Timeline

The project is expected to run from October 2026 through February 2027.

LADCO's budget for this engagement, excluding the optional Phase 3 extension, is not expected to exceed \$25,000. Proposers whose cost proposals substantially exceed this range should provide justification tied to their proposed approach.

Qualifications

Minimum qualifications:

- Demonstrated experience facilitating strategic planning processes for organizations or management teams of comparable size and complexity as the WI DNR Air Management Program.
- Ability to commit to the engagement schedule described in the Project Timeline, including weekly sessions in October-November 2026 and availability in February 2027 (specific dates to be finalized with the selected facilitator).

Preferred, not required:

- Familiarity with state environmental regulatory programs, air quality management, or Title V operating permit programs. Domain expertise is a plus but is explicitly not a disqualifying factor for otherwise qualified generalist facilitators.

Conflict of Interest:

Respondents must disclose any existing or prior business, financial, or personal relationship with WI DNR Air Management Program staff that could reasonably be perceived to affect the facilitator's neutrality. Disclosure does not automatically disqualify a respondent; LADCO will evaluate disclosed relationships on a case-by-case basis.

Evaluation Criteria

The following criteria will be used in evaluating the responses to this RFP. A review panel will score each of the factors below from 1 (worst) to 5 (best). The proposal with the highest weighted score will be selected for funding.

- Qualifications and approach – 50%
- Relevant domain familiarity (preferred, not required) – 10%
- Proposed cost – 20%
- Availability matching the required schedule – 20%