Madison Metropolitan Sewerage District

Facilitator for Internal and External Focus Groups

Request for Proposal

Madison Metropolitan Sewerage District (District) is seeking proposals from qualified facilitation professionals to design, execute, and provide analysis of two evaluative feedback engagements: One is a set of focus groups with specific District staff groups to deepen understanding of employee experience trends; and the second set of focus groups with complementary surveys of external District stakeholders to assess their trust in and satisfaction with the District. A shared trust framework will inform engagements but produce separate deliverables for different audiences.

The scope of services and requested deliverables for each engagement are outlined below. These engagements are being solicited as a single package for fiscal responsibility and contract management purposes.

Proposals will be accepted until 4:00 p.m. CT on Friday, October 16, 2026, via email to rfp@madsewer.org. The subject line must clearly state "Focus Groups Facilitation." Any questions should be directed to Amanda Wegner at rfp@madsewer.org.

All proposal responses and their contents will be public record.

The District is federal and state tax-exempt**.** The District reserves the right to reject any or all proposals, waive any technicality, and accept any proposal that may, in its opinion, be advantageous to the District.

Any questions may be directed to:
Amanda Wegner
Communications & Public Affairs Manager
Madison Metropolitan Sewerage District
rfp@madsewer.org

About the District

Established in 1930 to protect the lakes and streams of the upper Yahara watershed, the District is a wastewater collection and treatment utility serving about 440,000 people in 24 Madison-area owner communities covering about 190 square miles. Organized as a municipal corporation, the District is governed by a nine-member Commission appointed by the communities we serve.

The District owns and operates 150 miles of pipe and 18 regional pumping stations that convey approximately 38 million gallons of wastewater daily to the Nine Springs Wastewater Treatment Plant. Through the treatment process, we recover valuable resources from the wastewater we receive before returning clean water to the environment.

Our mission is to protect public health and the environment. The District is dedicated to service, reliability, and sustainability, and our tradition of innovation has positioned us as a leader among clean water utilities.

Learn more at www.madsewer.org.

Scope of Work

The scope of this project includes the design, execution, and analysis of two evaluative feedback engagements:

1. A set of focus groups with specific District staff groups to understand employee experience trends; and
2. A set of focus groups with complementary surveys of external District stakeholders to assess their trust in and satisfaction with the District.

The background, objectives, scope of work, and deliverables for each engagement are outlined below.

Engagement 1: Internal focus groups with select District staff

Background

Over the past three years, the District has conducted employee engagement surveys (most recently transitioning from Gallup to Energage) that provide quantitative data and benchmark comparisons. However, survey results alone, supplemented by limited open-ended comments the instrument captures, do not provide a complete picture of what's driving employee experience today.

The District is also navigating a period of significant organizational change, including organizational realignment, a new Executive Management Team (EMT), and an Enterprise Resource Planning (ERP) implementation project. Periods of transition like these are a natural opportunity to check in on how middle managers and employees are experiencing leadership, communication, and organizational changes. Intentional listening at this juncture can also help the District ensure that the things employees already value are being reinforced, and not lost, along the way.

The Executive Management Team is seeking a deeper, qualitative layer of insight to build on existing survey data and provide actionable findings. These findings will inform where the Executive

Management Team should adjust its approach and where it should stay the course as the organization moves through this period.

The leadership behaviors most closely tied to earning employee trust (i.e., transparency, competence, integrity, and empathy) are also those that build trust with the public and other external stakeholders. Because of this overlap, the District sees value in scoping both internal and external focus groups within a single consulting engagement. A facilitator working across both audiences is positioned to identify common threads in how trust is earned or eroded, while also producing separate deliverables tailored to different objectives and audiences.

Objective

The objectives of these focus groups are to:

- Gain a fuller perspective of how managers, supervisors, and employees are experiencing leadership, communication, and organizational alignment through first-hand data collection via focus group conversations.
- Frame conversations as a continuous improvement tool to support the Executive Management Team, not an evaluation of individual or team performance.
- Analyze existing engagement survey results, including open-ended comment themes, to inform focus group design (rather than re-surveying).
- Explore how different audiences perceive the Executive Management Team and organizational alignment, priorities, and direction. Assess where implementation of District changes, initiatives, and projects is landing as intended and where gaps exist.
- Surface actionable insights for EMT. Capture the distinct information and communication needs of different audiences, and recommend interventions and current practices to reinforce and continue.
- Apply a trust framework that is evidence-based and used consistently across both internal and external engagements. Identify common themes across internal and external audiences.

Deliverables

1. Focus Group Design

- Review District background materials (see Reference section), including employee engagement survey results. Consult with District staff on goals, target audiences, and key lines of inquiry.
- Recommend the number, composition, and format (in-person, virtual, or hybrid) of focus groups needed to meaningfully capture the perspectives of key audiences — at minimum, District managers, supervisors, and members of the Employee Leadership Council — accounting for each audience's distinct information and communication needs and ways of engaging.
- Propose a methodology that allows results to be reasonably aligned with the existing Employee Engagement survey and repeated in future cycles (approximately every other year).
- Present the recommended design to District staff for review and finalize the number, composition, and format of focus groups, along with proposed dates and locations/platforms, before proceeding.

2. Facilitation Planning & Logistics

- Work with District staff to finalize discussion guides and key questions tailored to each focus group audience.
- The District will provide contact information for potential participants; the Contractor will lead recruitment efforts and serve as participants’ primary point of contact, in coordination with the Human Resources Manager or their designee.
- Work with District staff to arrange all focus group logistics appropriate to the recommended format(s), including scheduling, meeting space or virtual platform, materials, and food/beverage as applicable.

3. Facilitation

- Facilitate and moderate all focus group sessions, maintaining ground rules and constructive group dynamics, and adapting facilitation techniques to fit each audience.
- Follow up with participants before and/or after sessions as needed to ensure accurate and complete representation of perspectives in the data.
- Where confidential information is uncovered during a session, work with the Human Resources Manager to ensure it is handled appropriately.

4. Reporting & Analysis

- Prepare a written draft report summarizing key findings and issues raised across all of the internal focus groups, organized congruently with the engagement survey themes as well as by audience. Include recommended action steps informed by participant feedback and insights.
- Where feasible, note points of comparison or contrast with survey data and the 2024 Trust in Leadership Research Findings Report to support trend analysis of employee trust and engagement over time.
- Include anonymized session notes/transcripts and participant lists in appendices.
- Meet with HR staff and the Executive Management Team to review the draft report and findings and prepare for presentations to the District Management Team and Employee Leadership Council.
- Deliver a final report incorporating District feedback.

5. District Management Team and Employee Leadership Council Presentations

- Work with the District’s Executive Office and Director of Communications to prepare a high-level presentation of focus group findings for the District Management Team and Employee Leadership Council.
- Present findings at a District Management Team meeting and Employee Leadership Council meeting. Remain available after each presentation to answer questions.

Proposers may include additional services beyond the above if those items add value to this work or have proven beneficial in similar engagements.

Primary Topics for Exploration

The following topics are offered as topics for exploration in this portion of the engagement. They are organized around the existing engagement survey and the five elements of the Commission-approved Public Trust definition. They also draw on research on workplace trust — including recurring measures such as transparency, competence, and goodwill. Individual topics and questions should be tailored to each specific focus group and audience; the Contractor may propose additional topics based on their expertise and experience with similar facilitation efforts.

- **Goodwill and collaborative relationships:** How do participants characterize their relationships and partnerships within the District? Do they feel treated as partners/collaborators rather than simply resources? Where relevant to the audience, how well do participants feel connected to the Executive Management Team and read positive intent into their decisions?
- **Employee-focused actions:** Are participants satisfied with the direction that the Executive Management Team provides? How would they rate the ease of working across departments and directors' responsiveness to questions, requests, or concerns? How would they rate the Executive Management Team's interactions and decisions, and where are there opportunities for improvement?
- **Transparent communications:** What are this audience's preferred modes, channels, and frequency of communication (e.g., email, meetings, digital/social channels)? Who do they look to the most for change and decision communications? Is communication timely and clear? Do participants feel the Executive Management Team follows up and closes the loop on feedback — including feedback shared in employee surveys? How do communication needs differ from other audiences, and how might the District better tailor its internal communications?
- **Consistent and dependable service:** Does the District follow through on its commitments to staff, owner communities, and stakeholders? Are decisions and priorities consistent with the District's stated values?
- **Trust and confidence:** How confident are they that leaders are well-informed and competent in their roles and decision-making? What overall level of trust and confidence does this audience have in District leadership? This topic can draw on the 2024 Trust in Leadership Research Findings Report and engagement survey results to assess whether trust has changed.

Engagement 2: External stakeholder focus groups

Background

In spring 2026, the District Commission approved an updated Strategic Plan, which includes "Public Trust" as one of four performance areas. This performance area is defined as follows:

> *"As a critical public service with broad reach, the District recognizes the importance of building goodwill and collaborative relationships to impact our operations and organizational effectiveness positively. For the District, this means striving for public trust and instilling confidence through customer-focused actions, transparent communications, management of high-quality and effective programs, and consistent and dependable service."*

Public Trust is measured through two Key Performance Indicators (KPIs): Public Sentiment Analysis (general public) and Stakeholder Satisfaction Assessment (Commission, the District's customer communities, and direct stakeholders/partners). A focus group format, with a survey for stakeholders not selected for the focus groups, has been selected for the Stakeholder Satisfaction Assessment, building on a previous stakeholder engagement focus group effort in 2024.

The District's Stakeholder Satisfaction Assessment KPI is defined as follows:

- Measure: Recurring comparison of survey results of direct stakeholders of District performance; i.e., the Commission and customer communities and partners to assess the level of trust and confidence in District performance.
- Rationale: To separate the general public from those with a direct stake in District performance. May have a large influence on District policy.
- Type: Monitoring metric. Reflects past performance, changes slowly, critical for stakeholder confidence

The District seeks a qualified facilitator to design and conduct focus groups and, as a complement, surveys to gather qualitative feedback from the Commission, customer communities, and direct stakeholders/partners to inform this KPI. We recognize that these audiences — customer community leadership, customer community staff, and other direct stakeholders/partners — have distinct relationships with the District and different information and communication needs. The Contractor will recommend a structure that will most effectively surface each audience's perspective while enabling meaningful, recurring comparison over time, including to the 2024 baseline effort referenced above.

Objective

The objectives of these focus groups are to:

- Gain a fuller perspective of Commission, customer community, and stakeholder experiences with the District and its staff through first-hand data collection via conversations and facilitated interview questions;
- Understand how these audiences perceive the District, its work, programs, and staff interactions;
- Assess the level of trust and confidence these audiences have in the District, particularly its leadership and staff;
- Determine priorities, areas of concern, and views on issues related to the District and the level of service it provides;
- Capture the distinct information and communication needs of different audiences so the District can better tailor its engagement; and
- Identify action steps and/or possible policy changes for the District based on focus group results, and establish a methodology that supports recurring, comparable measurement of this KPI over time.

Scope of Work & Deliverables

1. Focus Group Design

- Review District background materials (see Reference section) and consult with District staff on goals, target audiences, and key lines of inquiry.
- Recommend the number, composition, and format (in-person, virtual, or hybrid) of focus groups needed to meaningfully capture the perspectives of key audiences, accounting for each audience's

distinct information and communication needs and ways of engaging. Preferred audiences include customer community leadership (elected officials/municipal leaders); customer community staff; and other direct stakeholders/partners (e.g., the county, regional planning authority, nonprofits)

- Propose a methodology that allows results to be reasonably compared to the 2024 focus group effort and repeated in future cycles, consistent with the KPI's design as a recurring monitoring metric.
- Present the recommended design to District staff for review and finalize the number, composition, and format of focus groups, along with proposed dates and locations/platforms, before proceeding.

2. Survey Component

- Design complementary survey(s) to run alongside the focus groups, administered via a commercially available online survey platform (e.g., SurveyMonkey or comparable), with the specific platform and structure recommended by the Contractor. The vendor should deliver a recommendation and design for surveys, but also consider:
  - At minimum, consider a pre-session survey to establish baseline awareness/perceptions among focus group participants, which is consistent with the 2024 approach, and a method to gather immediate participant feedback on the focus group experience.
  - Recommend whether a broader survey should also be offered to those in the identified stakeholder groups who are not able to participate in or were not selected for a focus group session, to extend the reach of data collection.
  - In both instances, District staff can manage the sending of this email and survey.
- Design survey questions to align with focus group topics and, where feasible, to support comparison with 2024 survey results, consistent with the KPI's design as a recurring, comparable measure.
- Analyze survey results alongside focus group findings and incorporate them into the reporting described below.

3. Facilitation Planning & Logistics

- Work with District staff to finalize discussion guides and key questions tailored to each focus group audience.
- The District will provide contact information for potential participants; the Contractor will lead recruitment efforts and serve as participants' primary point of contact, in coordination with the Communications & Public Affairs Manager.
- Arrange all focus group logistics appropriate to the recommended format(s), including scheduling, meeting space, materials, and food/beverage as applicable. In-person focus groups are preferred.

4. Facilitation

- Facilitate and moderate all focus group sessions, maintaining ground rules and constructive group dynamics, and adapting facilitation techniques to fit each audience.
- Follow up with participants before and/or after sessions as needed to ensure accurate and complete representation of perspectives in the data.

- Where confidential information is uncovered during a session, work with the Communications & Public Affairs Manager and/or Executive Director to ensure it is handled appropriately.

5. Reporting & Analysis

- Prepare a written draft report summarizing key findings and issues raised across both focus groups and surveys, organized by audience and by topic, with recommended action steps informed by participant feedback and insights.
- Where feasible, note points of comparison or contrast with the 2024 focus group and survey findings to support trend analysis of stakeholder trust and confidence over time.
- Include session notes/transcripts, aggregate survey results, and a list of participants (or participant composition, if anonymity is preferred) in appendices.
- Meet with District staff to review the draft report and findings and prepare for presentation to the Commission.
- Deliver a final report incorporating District feedback.

6. Commission Presentation

- Work with the District's Communications & Public Affairs Manager to prepare a high-level presentation of focus group findings for the Commission.
- Present findings at a Commission meeting and remain available afterward to answer Commissioners' questions.

Proposers may include additional services beyond the above if those items add value to this work or have proven beneficial in similar engagements.

Primary Topics for Exploration

The following topics are offered as topics for exploration in this portion of the engagement. They are organized around the five elements of the Commission-approved Public Trust definition and may be used in both focus group discussions and the complementary survey(s). They also draw on the 2024 focus group findings and on public-sector and utility-sector research on public trust — including recurring measures such as reliability, transparency, competence, and goodwill as core components of institutional trust, and utility customer-satisfaction research identifying communication, responsiveness, and value for cost as key drivers of trust. Individual topics and questions should be tailored to each specific focus group and audience; the Contractor may propose additional topics based on their expertise and experience with similar facilitation efforts.

- **Goodwill and collaborative relationships:** How do participants characterize their relationship and partnership with the District? Do they feel treated as partners/investors rather than simply ratepayers? Where relevant to the audience, how well do participants understand and feel connected to the Commission and the appointing/governance relationship between their community and the District?
- **Customer-focused actions:** Are participants satisfied with the level of service the District provides? How would they rate ease of doing business with the District and its responsiveness to questions, requests, or concerns? How would they rate their interactions with District staff, and where are the opportunities for improvement?

- **Transparent communications:** What are this audience's preferred modes, channels, and frequency of communication with the District (e.g., email, meetings, digital/social channels)? Is communication timely and clear? Do participants feel the District follows up and closes the loop on feedback — including feedback shared in the 2024 focus groups? How do communication needs differ from other audiences, and how might the District better tailor its outreach?
- **High-quality and effective programs:** Do participants understand the District's mission and programmatic work, including work in support of permit requirements? Do they see a role for themselves in supporting or communicating that work?
- **Consistent and dependable service:** Do participants view the District's service and technical performance as reliable and consistent over time? Does the District follow through on its commitments to owner communities and stakeholders?
- **Trust and confidence:** What overall level of trust and confidence does this audience have in District leadership and staff? This topic can draw on the 2024 focus group findings as a point of comparison to assess whether trust has changed.
- **Management and use of rate dollars:** How do participants perceive the District's management of rate dollars and resources, and the value received for what is paid?
- **Priorities, concerns, and views:** What are this audience's priorities, areas of concern, and views on issues related to the District and the level of service it provides?

RFP Timetable

The District may change the RFP timetable at any time.

Target Date	Step	Notes
Wednesday, September 15, 2026	RFP Issued	Publicly posted to District website and online procurement portals
Wednesday, September 29, 2026 at 4:00 p.m. CT	Deadline for Respondent Questions	Must be submitted via email at rfp@madsewer.org
Monday, October 5, 2026 at 4:00 p.m. CT	Respondent Questions Answered	Responses posted on District website.
Friday, October 16, 2026 at 4:00 p.m. CT	Respondent Proposals Due	Final deadline for submission
Friday, October 23, 2026	District Proposal Review Completed	Completed by internal selection committee
Week of October 26, 2026	Virtual Interviews (if needed)	Conducted via Microsoft Teams.

Friday, October 30, 2026	District Selection Made and Applicants Notified	
Week of November 2 or November 9, 2026	Engagement begins if Commission approval is not required (contract under $50,000)	
Thursday, November 5, 2026	Commission Transaction Approval (if needed)	
Week of November 9, 2026	Engagement begins if Commission approval is required.	

Proposal Evaluation

Proposals will be evaluated by a selection committee composed of District staff and scored on a 100-point scale according to the criteria below.

Criteria Category	Points	Key Focus Areas
1. Proposed Approach & Methodology	35	Approach demonstrates understanding of the individual engagements; approach(es) grounded in a validated framework or instrument.
2. Qualifications & Experience	30	Demonstrated experience and qualifications in focus group facilitation; experience working with public sector or utility clients.
3. Schedule & Capacity	15	Demonstrated ability to deliver all deliverables in a timely manner. Clear timeline with the internal and external engagements outlined separately.

Criteria Category	Points	Key Focus Areas
4. Pricing & Value	20	Value relative to scope. The District prefers to keep the engagement under $50,000; proposals should reflect a not-to-exceed cost with a clear breakdown of hours and billable rates.

The District will not award a contract solely on price; the award will be made in the District's best interest as determined by the evaluation committee. Contract award shall be made to the best-qualified consultant upon successful negotiation of fair and reasonable compensation under a "not-to-exceed" contract structure. The District prefers to keep this engagement under $50,000, thereby eliminating the need for Commission approval.

How to Apply

Proposals should be concise and limited to no more than 15 pages (excluding specific items noted below). Core narrative pages must be numbered and include all information relevant to the evaluation. The evaluation team will not review proposals that exceed the page limit.

Proposals should include the following:

- **Contact information** for the primary contact.
- **Proposed approach and methodology**: Facilitation design for internal and external focus groups, a short description of a validated instrument or framework that would be proposed or adapted for the external survey, and anything else that differentiates your approach.
- **Relevant experience**: Up to three examples or case studies of similar prior work, prioritizing public-sector or utility clients within the last five years.
- **Team qualifications:** Brief description of the relevant experience and skills of the individual(s) to be involved (including subcontractors, if any).
- **Project Schedule**: Description of how work would be carried out within the timeline above, and break the project into phases and tasks with an estimated schedule.
- **Pricing**: Provide a not-to-exceed cost with a detailed breakdown of hours and billable rates by individual and task for each subproject.
- **References**: Provide name, title, organization, phone, and email for at least two references. The District will not contact references until after selections are made.

The following materials are the only items excluded from the 15-page limit:

- Cover page and table of contents
- Team member resumes
- Sample discussion guides, session outlines, and/or past findings reports

All information relevant to the evaluation, including team members' qualifications and cost details, must appear in the core narrative; the evaluation team will not review appendices for scored content, except as noted above.

Proposals will be accepted via email to rfp@madsewer.org until 4:00 p.m. CT on Friday, October 16, 2026. The subject line must clearly state "Focus Groups Facilitation."

Reference Materials

The following materials should be used in reference to this RFP and will be provided or made available to Proposers:

- 2024 Stakeholder Focus Group Findings Report
- District Strategic Plan (April 2026)
- 2024 Community Values Survey Findings Report

These materials will be made available to the vendor selected for this engagement:

- June 2026 Energage Engagement Survey results
- 2024 Trust in Leadership Report

Professional Services Agreement

Following the selection of a qualified firm for the work of this RFP, a signed professional services agreement will be required. The District supplies the agreement template as the basis for negotiations, which will include Terms & Conditions and the Scope of Services for performance. Proposers must notify the Project Manager of any questions or concerns about the standard Terms & Conditions during the request for proposal process.

Insurance Requirements

The District's insurance requirements are included below. A bidder may propose exceptions or modifications to the District's insurance requirements that may or may not be acceptable to the District. The District retains the right to establish the final insurance requirements during negotiations with the highest-ranked bidder based on the nature and scope of the services, potential liability exposure, involvement in design or construction, anticipated site activities, contract amount, and the availability of coverage. If the District and the highest-ranked bidder cannot reach an acceptable agreement, the District may discontinue negotiations and proceed to the next-ranked bidder. The final insurance requirements will be incorporated into the executed Agreement.

Contractor shall maintain Commercial General Liability, Automobile Liability, Workers Compensation, Professional Liability (Errors & Omissions), and Cyber Liability insurance throughout the term of the agreement. Minimum limits shall be $1,000,000 per occurrence/ $2,000,000 aggregate for General Liability; $1,000,000 combined single limit for Automobile Liability; statutory Workers Compensation limits; $1,000,000 per claim Professional Liability; and $1,000,000 Cyber Liability. The District shall be named as an Additional Insured on the General Liability policy, and coverage shall be primary and non-contributory.

Additional Provisions

Equal Employment Opportunity Requirements

In connection with the performance of work for this project and under the related contract, the Proposer agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, disability, sex, national origin, sexual orientation, gender identity, or other status protected by law. This provision shall include, but not be limited to, the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship.

Use, Disclosure, and Confidentiality of Information

The information supplied by a Proposer as part of an RFP response will become the property of the District. Proposals will be available to interested parties in accordance with the Wisconsin Open Records Law. None of the proposal responses will be made available to the public until after the negotiation and award of a contract or cancellation of the procurement.

To the extent allowed by law, the District will treat trade secrets as confidential (if designated as confidential and submitted separately in a sealed envelope). If a Proposer wishes for a proposal to remain confidential, the Proposer must, before submitting a proposal, establish to the District's satisfaction that the proposal be given confidential status. The District reserves the right to make any final disclosure determinations in accordance with the law. (Note: Pricing information will not be considered confidential.)

Use of the District's Name

Upon entering an agreement, the successful Contractor agrees not to use the name of the Madison Metropolitan Sewerage District in relation to the agreement in commercial advertising, trade literature, or press releases to the public without the prior written approval of the District. The District has the right to enjoin the Contractor from any such use in violation of this provision, and the Contractor shall be responsible for damages and reimbursement of actual, reasonable legal fees incurred with regard to legal evaluation and/or legal action taken by the District because of the Contractor's violation of this provision, including fees incurred to obtain an injunction.

Confidentiality

Subject to Wisconsin's Public Records law, any data or other information regarding the District's customers, operations, or methods obtained by the Contractor during the course of the project shall remain confidential and shall not be released to third parties without the express written consent of the District.

Errors in Proposals

Proposers will not be allowed to change or alter their proposals after the proposal submission deadline. The District reserves the right, however, to correct obvious errors, such as math errors in extended pricing (not unit pricing). This type of correction may only be allowed for "obvious" errors such as arithmetic, typographical, or transposition errors. Any such corrections shall be approved by the District and countersigned by the Proposer. Proposers are advised to make sure that their proposals are true and correct.

Revision to the RFP

The District may modify or amend this RFP at any time. In such an event, the submission deadline may be extended, at the option of the District, to allow Proposers the opportunity to revise their proposals accordingly.

Addendums

If it becomes necessary to materially alter the request for proposal, the Project Manager will issue an official addendum.

Sub-consultants and Third-party Payments

All sub-consultants shall be pre-approved by the District and must abide by all terms and conditions of the contract. The prime Consultant shall be responsible for all sub-consultant(s) work and payment. The District will not directly pay any sub-consultant or third parties.