

Proposer Name: YMCA _____

Evaluator Name: Councilor Garland _____

Selection Review Committee RFP Evaluation Form

Recreational and Aquatic Center Operations and Management Services

Instructions: Each member of the Selection Review Committee will provide two evaluations for each proposal:

1. An evaluation of the written proposal.
2. An evaluation of the interview (if applicable).

Each evaluation will be made based on the following scoring criteria:

	TOTAL POINTS	100
Criteria	Maximum Score	
Introductory Letter (not scored, but considered)	--	
Overall Experience	30	
Proposed Programming/Operational Plan	30	
References	15	
Budget/Financial Proposal	25	
	TOTAL POINTS	100

After the interview evaluation process has been completed, determination of the successful proposer will be based on **both** the interview evaluation and the written proposal evaluation.

Written Proposal Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	<ul style="list-style-type: none"> Strong experience (18 years) with current facility Experience with local market and trends Experienced staff, with a large number of local volunteer hours 	30	27
Proposed Programming / Operational Plan	<ul style="list-style-type: none"> Programs at YMCA currently include programs for Teen Center, free Child Care, scholarships Philosophy includes strong commitment to community involvement through local Sherwood events Local management and Board of Managers Well-documented staff manual, training plan materials 	30	27
References	<ul style="list-style-type: none"> Five (5) professional references provided Fourteen (14) personal references provided 	15	15

Note: This form is subject to Oregon Public Records Law

<p>Budget/Financial Proposal</p>	<ul style="list-style-type: none"> • YMCA proposed to operate at a net income profit for each of next 5 years • Membership rates to stay at current rates • No Management Fee charged to the City • Any deficit (net income loss) will be covered by the YMCA – not the City • Three (3) years of financial records provided with RFP 	<p>25</p>	<p>23</p>
<p>Total:</p>		<p>100</p>	<p>92</p>

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Interview Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	<ul style="list-style-type: none"> • 18+ years of experience in current facility management • Local management is a strong plus • Mission statement aligns well with Sherwood community 	30	27
Proposed Programming / Operational Plan	<ul style="list-style-type: none"> • Strong local community involvement, through health initiatives (Diabetes Prevention Program), free Child Watch, and scholarships • Scholarships of \$325K in 2016, and proposed to provide the same in 2017 • Plan to hire Executive Director after RFP process concludes • Hours of Operation would remain the same 	30	25
References	N/A	15	0
Budget/Financial Proposal	<ul style="list-style-type: none"> • YMCA proposed to operate at a net income profit for each of next 5 years • Membership rates to stay at current rates • Operating surplus will stay with the community • Operating net losses will be absorbed by the YMCA 	25	23
Total:		100	75

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Proposer Name: Health Fitness _____

Evaluator Name: Councilor Garland _____

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2. An evaluation of the interview (if applicable).

Each evaluation will be made based on the following scoring criteria:

	TOTAL POINTS	100
Criteria		Maximum Score
Introductory Letter (not scored, but considered)		--
Overall Experience		30
Proposed Programming/Operational Plan		30
References		15
Budget/Financial Proposal		25
	TOTAL POINTS	100

After the interview evaluation process has been completed, determination of the successful proposer will be based on **both** the interview evaluation and the written proposal evaluation.

Written Proposal Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	<ul style="list-style-type: none">• Solid history of similar facilities, including a city-run facility (Bethel AK)• Experienced staff with solid management core	30	27
Proposed Programming / Operational Plan	<ul style="list-style-type: none">• Good history of transitions• Marketing plan is high-quality, with open input from City available• Program Value Analysis (PVA) and sample Monthly Management Report are well-written and thorough• Draft Transition Plan is adequate	30	25
References	<ul style="list-style-type: none">• Three (3) references provided• Well-documented examples of partnerships	15	15
Budget/Financial		25	15

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Proposal	<ul style="list-style-type: none"> • Original pro forma submitted indicates a yearly net income loss • Proposal would maintain current membership fee rates • Fixed management fee • Losses incurred would be responsibility of City 		
Total:		100	82

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Interview Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	<ul style="list-style-type: none"> Health Fitness exhibited a strong history of transitioning existing facilities HF displayed experience with a wide range of healthcare facilities Potential for additional HF growth throughout the country 	30	25
Proposed Programming / Operational Plan	<ul style="list-style-type: none"> Good descriptions of transition plans Staffing plans were well-described, specifically with regards to existing staff I have a concern with the remote (out of state) structure of the Organizational Team While HF has some community involvement in their other facilities, these events were more focused on fundraising and membership drives, and not for scholarships 	30	23
References	N/A	15	0
Budget/Financial Proposal	<ul style="list-style-type: none"> Updated pro forma (dated 7/27/17) shows a net income profit in Year 5, but an overall projected loss for 5-year projection Year over year increase in management fee 	25	18
Total:		100	66

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Proposer Name: Tualatin Hills Park & Rec. District__

Evaluator Name: Councilor Garland _____

Selection Review Committee RFP Evaluation Form

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Instructions: Each member of the Selection Review Committee will provide two evaluations for each proposal:

1. An evaluation of the written proposal.
2. An evaluation of the interview (if applicable).

Each evaluation will be made based on the following scoring criteria:

	TOTAL POINTS	100
Criteria		Maximum Score
Introductory Letter (not scored, but considered)		--
Overall Experience		30
Proposed Programming/Operational Plan		30
References		15
Budget/Financial Proposal		25
	TOTAL POINTS	100

After the interview evaluation process has been completed, determination of the successful proposer will be based on **both** the interview evaluation and the written proposal evaluation.

Written Proposal Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	<ul style="list-style-type: none">• Well-established organization in the region• Inclusive Mission and Vision Statements	30	22
Proposed Programming / Operational Plan	<ul style="list-style-type: none">• Hours of Operation would not change• Increased membership fees over current rates offered	30	23
References	<ul style="list-style-type: none">• None provided	15	0
Budget/Financial Proposal	<ul style="list-style-type: none">• Pro forma indicates net income loss of over \$200K/year (responsibility of city)• Increased membership fees over current rates offered	25	15
Total:		100	60

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Interview Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	<ul style="list-style-type: none"> • Management staff has extensive experience, with many years in current roles. Excellent stability. • THPRD does not have experience in transitioning existing facilities. Experience is with new facilities only • THPRD does have experience with expansions of facilities (Elsie Stuhr and Conestoga) 	30	18
Proposed Programming / Operational Plan	<ul style="list-style-type: none"> • THPRD would not include Sherwood facility into greater THPRD centers (standalone facility) • There are no future plans to expand THPRD boundaries to include Sherwood • Recruitment for job positions would not allow for special allowances for existing employees • Lack of planning concerning transition plans 	30	15
References	N/A	15	0
Budget/Financial Proposal	<ul style="list-style-type: none"> • Scholarships would not come from THPRD • Project net loss, but any profits (if exists) would be split between THPRD and City • General lack of detailed financial information provided during the interview 	25	15
Total:		100	48

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Proposer Name: SFM/CH _____

Evaluator Name: Councilor Garland _____

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Instructions: Each member of the Selection Review Committee will provide two evaluations for each proposal:

1. An evaluation of the written proposal.
2. An evaluation of the interview (if applicable).

Each evaluation will be made based on the following scoring criteria:

	TOTAL POINTS	100
Criteria		Maximum Score
Introductory Letter (not scored, but considered)		--
Overall Experience		30
Proposed Programming/Operational Plan		30
References		15
Budget/Financial Proposal		25
	TOTAL POINTS	100

After the interview evaluation process has been completed, determination of the successful proposer will be based on **both** the interview evaluation and the written proposal evaluation.

Written Proposal Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	<ul style="list-style-type: none">• Limited/ no experience running facility similar to Sherwood Rec. Center• Little mention of community involvement	30	10
Proposed Programming / Operational Plan	<ul style="list-style-type: none">• Emphasis on Marketing Plan, lacking in Operational Plan	30	10
References	<ul style="list-style-type: none">• Seven (7) references provided	15	15
Budget/Financial Proposal	<ul style="list-style-type: none">• Proposal limited to vague guidelines, other than Base Management Fee• No pro forma or projections provided	25	5
Total:		100	40

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Interview Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	N/A	30	0
Proposed Programming / Operational Plan	N/A	30	0
References	N/A	15	0
Budget/Financial Proposal	N/A	25	0
Total:		100	0

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Proposer Name: United Pool Management_____

Evaluator Name: Councilor Garland_____

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	TOTAL POINTS	100
Criteria		Maximum Score
Introductory Letter (not scored, but considered)		--
Overall Experience		30
Proposed Programming/Operational Plan		30
References		15
Budget/Financial Proposal		25
	TOTAL POINTS	100

After the interview evaluation process has been completed, determination of the successful proposer will be based on **both** the interview evaluation and the written proposal evaluation.

Written Proposal Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	<ul style="list-style-type: none">• Experience limited to aquatic centers – no gym experience• No mention of community involvement	30	5
Proposed Programming / Operational Plan	<ul style="list-style-type: none">• Limited plan using generic language	30	5
References	<ul style="list-style-type: none">• None provided	15	0
Budget/Financial Proposal	<ul style="list-style-type: none">• Proposal limited to vague terms• No pro forma or projections provided	25	5
	Total:	100	15

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Interview Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	N/A	30	0
Proposed Programming / Operational Plan	N/A	30	0
References	N/A	15	0
Budget/Financial Proposal	N/A	25	0
Total:		100	0

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