

Proposer Name: YMCA

Evaluator Name: Jennifer Kuiper

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	See accompanying spreadsheet for detailed notes	30	26
Proposed Programming / Operational Plan	See accompanying spreadsheet for detailed notes	30	30.25
References	See accompanying spreadsheet for detailed notes	15	12
Budget/Financial Proposal	See accompanying spreadsheet for detailed notes	25	20
	Total:	100	88.25

Note: This form is subject to Oregon Public Records Law

Interview Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	See accompanying spreadsheet for detailed notes	30	30
Proposed Programming / Operational Plan	See accompanying spreadsheet for detailed notes	30	25.5
References	See accompanying spreadsheet for detailed notes	15	0
Budget/Financial Proposal	See accompanying spreadsheet for detailed notes	25	20
Total:		100	76.5

Note: This form is subject to Oregon Public Records Law

Evaluation: Written Proposal		
Respondent: YMCA		
Reviewer: Jennifer Kuiper		
Criteria	Proposal Score	Notes
Introductory Letter (not scored, but considered)		
Letter addressed to City's Project Manager, include Proposer's name, and printed name, title, phone number and email address of officer authorized to represent proposal in any correspondence, negotiations, and contracting signing	Provided	Four page letter. Some information in letter would have been better provided in the appropriate section per the RFP.
Letter to include address of the office that will be providing the service and the project manager's name title telephone number and email address.	Not Provided	
Address Proposers understanding of the work to be accomplished	Provided	
willingness and commitment to provide services offered	Provided	
brief outline of Proposer's strengths	Provided	
description of why Proposer believes organization should be selected	Provided	
Proposers federal and state tax ID Numbers, and state of incorporation	Not Provided	
Signed by Proposer	Provided	
Overall Experience (Organization Experience and Qualifications) - 30 points max		
Provide a profile of organization and describe legal structure, principal officers and organization structure	4	Information is there but not well-organized.
Provide copy of any organization profile, sales brochure or other documentary information pertaining to organization	5	Good back up data presented in Exhibit.
Provide resumes of key personnel including proposed facility manager and principals of Proposer's organization	3	No facility manager name provided as requested in RFP.
Provide the year and month when Proposer's organization was formed	5	
Provide a complete and detailed history of Proposers facility management experience over last five years. Include contact information	4	No contact information provided
Provide a list of facilities managed by Proposer on behalf of clients. Include contact information.	5	
Subtotal Score	26	
Proposed Programming/Operational Plan - 30 points max		
Possible scores of up to 1 for each subcategory		
1. Management Plan: Provide explanation of overall philosophy on how Proposer would manage and operate facility including:		
overview of timeline of crucial milestones, and description of roles and responsibilities	0.25	No overview of timeline regarding crucial milestones.
suggested management organization chart of key management of the facility, identifying all full time and part time positions and their operational roles	0.75	Good Sherwood YMCA Org Chart. Don't see chart for Board of Managers and no chart shows where the City fits in.
a description of the reporting structure between facility management and corporate offices, and to the City of Sherwood. Describe proposed form of governance for facility	1	Good discussion of reporting structure. Note that YMCA is amenable to discussing reporting structure with City
Provide information on the operational performance of comparable rec facility that is relevant to the proposal. Include a least one comparable community to the City of Sherwood with a public agency as a partner	1	Information was provided operational performance information for Sherwood, Clark County, Beaverton Hoops
Operational reports to be provided on a quarterly basis	1	YMCA provides reports on a quarterly basis
	4	
2. Marketing Plan - Provide an explanation of the overall philosophy to market the facility including:		
Overview of marketing and promotional concept that will further goals of the city as a premier venue and maximize the economic impact to the region	1	YMCA retains one part time Marketing Manager. YMCA marketing plan in Exhibit 12 speaks directly about the the needs of the city and identifies existing and ongoing partnerships with several city and national organizations
A description of proposers approach to booking scheduling promoting, advertising, and marketing events, programs, and services	1	Full schedule of events shown in Exhibit 13, no discussion of how volunteers are mobilized but they are.
Identification of any competing facilities managed by Proposer.	1	No competing facilities.
Identification of any synergies, alliances, key relationships, and other marketing opportunities Proposer will established between other facilities it manages and how these could benefit the Sherwood Facility	1	national reciprocity program soon to be place for all Y members. Oregon state has reciprocity among members now.
sponsorship strategies	0.5	No existing sponsorship opportunities, but YMCA currently is working on a plan to collaborate with companies to the benefit of the facility and staff.
	4.5	
3. Staffing		
Describe your personnel management philosophy and describe the steps you will take to ensure that only individuals of the highest quality are employed to provide recreational services	0.75	Clear on management philosophy as being mission driven. YMCA hires those drawn to vision, mission, impact and cause. YMCA has a large national pool employment database to pull high quality staff.

	1	YMCA begins retention with proper vetting to ensure candidates share the value of making a difference. YMCA provides training and a comprehensive leadership development and certification system. Online courses, regional training. Annual staff satisfaction survey
Describe your philosophy on retaining these highly qualified individuals		
Provide a staffing plan for facilities showing coverage during a normal operating day.	1	Provided in Exhibit 15
Provide a hiring plan for initial start up	0.5	No hiring plan provided but current hiring plan is expected to be used.
Provide a copy of a current employee handbook and/or regulations	1	YMCA Branch Supplement for Employees provided in full.
	4.25	
4. Program or Curriculum		
Describe proposed hours of operation	1	Clear hours stated.
Describe the services you would provide to the public	1	Nice summary of services provided to community
Provide details on how you would design, implement, administer, and evaluate high quality operations	1	administer high quality programs. YMCA also recommends forming a Community Services Planning Group led by the Cities Community Services Department. Group would be a partnership of stakeholders. Programs evaluated formally and informally.
Provide a statement of the educational/guiding philosophy by which the services would be operated if the Proposer were awarded the contract.	0.75	Statement provided in proposal but it was out of order of the RFP.
Describe how you would evaluate the quality of services and programs on an ongoing basis	1	Robust program
	4.75	

5. Financial Plan - Provide an explanation of the overall financial plan including:		
A spreadsheet model that displays revenue and expenditure categories in dollar figures by fiscal year of July 1 to June 30, beginning with the 1st year of operations and carried out a minimum of five years. The spreadsheet model will clearly identify the operating net income each fiscal year, with a narrative explanation of how deficits will be funded or gains will be utilized.	0,75	Table imbedded in proposal was sufficient. Shows operating net to be applied toward additional Facility Improvements per notation. I think this is a negotiating point for City and YMCA.
Revenue and expenditure assumptions should be clearly footnoted and explained	1	Notes very explanatory.
A narrative summary of the Proposer's strategy for minimizing the annual operating expenses and maximizing the annual operating revenues. The proposed strategy should be based on Proposer's existing understanding of similar operations and its overall approach for maximizing reviews and minimizing expenses.	1	Budget process considers both current and future economic models along with scenario planning. Mid-year forecasting to readjust trends
A proposed strategy for a scholarship program and approximate amount of funds set aside each year for scholarships	0.5	YMCA discussed providing around \$300K in scholarships, do not set aside specific funds for such scholarships but provide reduced rates for those who apply and qualify (I assume its revenue foregone type of strategy, though it was not specifically identified as such).
A summary of Proposer's proposed strategy for maximizing advertising and sponsorship sales for the facility	0.5	Historically YMCA has not focused on sponsorships. However, YMCA appears to be working on a plan to collaborate with companies on sponsorships.
User Fee schedule, including a differentiation between residents of Sherwood and non residents	1	Low member rates.
	4.75	
6. Maintenance Plan		
The Maintenance Plan must consist of daily upkeep and well as maintaining the major systems and infrastructure of the facility. How the Maintenance Plan is foreseen to be funded must also be included.	3	YMCA's maintenance plan discussion was more like a negotiating statement. Further in proposal, YMCA indicates it contracts with TCMS to oversee facility mechanical systems. YMCA Board of Managers leads a facilities committee, City is represented. In Q2 2017, YMCA updated its custodial plan. Need more specifics and a path forward that was not described in proposal.
	3	
7. Compensation		
Provide an outline of a potential compensation proposal should Proposer be selected to operate and manage the facility	3	YMCA uses Associations Share Service allocation of \$300,000K approximately. YMCA has proposed 11%. I suggest closer to 9%
	3	
8. Other		
Please include any other information that would be applicable to Proposer's complete operational plan. This may include alternative proposals.	2	Respondent provided information regarding a plan forward for facility expansion, its role in that expansion and ideas for an operational and expansion plan. YMCA is interested in participating with the city to exploring expansion alternatives.
	2	
Subtotal Score	30.25	
References (15 points max)		
No fewer than three references from accounts where Proposer is currently or has previously provided full time, onsite management	12	References section was out of order in the proposal, resulting in this reviewer searching outside the RFP format to find the references mentioned (they were mentioned in cover letter, and not in actual response text).
	12	
Subtotal Score	12	
Budget/Financial Proposal (25 points max)		
Provide profit and loss statements for facilities managed in past 3 years, in sufficient detail that represents a fair and accurate portrayal as to the financial viability of the organization to run such a facility in a financially sustainable way. At least one example for a facility Proposer currently operates.	20	YMCA provided profit and loss statements in the proposal in Exhibit 11, all showing budget provides the best monetary option of the city as the projected revenues exceed expenditures and the YMCA has indicated it will subsidize losses. However, I removed 2 points for being 2 percentage points over where I think the Association fee (management fee) should be, which I think should be closer to 9%; I removed 1 point for redirecting funds back into the facility, without conferring with the City first; and I removed 2 points because the pro forma in the proposal doesn't calculate depreciation of equipment into the Operating Net over the next five years, even though it is shown in Exhibit 11 Profit and Loss, which shows an overall loss for the Sherwood facility.
	20	
Subtotal Score	20	
TOTAL WRITTEN PROPOSAL SCORE	88.25	

Evaluation: Interview		
Respondent: YMCA		
Reviewer: Jennifer Kulper		
Criteria	Interview Score	Notes
Overall Experience (Organization Experience and Qualifications) - 30 points max		
	30	YMCA has extensive experience not just in the Sherwood facility but pulls from experiences from across the nation for over 150 years. Experience also includes childcare and seniors.
Proposed Programming/Operational Plan - 30 points max		
up to roughly 4 pts given per subcategory		
1. Management Plan	3	Local YMCA overseen by a local Board of Managers who report to YMCA Board of Trustees who govern the Association. No mention of how City would be involved. YMCA confirmed that quarterly financial reports and operating reports will continue to be submitted to City. YMCA indicated that City Commission like a property committee is a good idea and that the Commission would fold into the Board of Managers. Not sure if this was the committee they mention in their proposal or not. (As a side note: this reviewer believes the Board of Managers name should be changed, with 50% staffed by city staff).
2. Marketing Plan	4	YMCA will continue to employ a part time onsite Marketing Director to continue marketing efforts. YMCA confirmed that better joint messaging and joint signage is needed and they look forward to discussing that with the City
3. Staffing	3.5	YMCA staffing centers around the YMCA culture of serving and caring for others. They cross-train staff. No discussion on attracting and retaining high quality staff through competitive salaries or compensation; but more information provided in proposal. Results of recent staffing survey showed improvements are needed.
4. Program or Curriculum	3.5	YMCA designs and supports a wide variety of community programs in addition to their fitness programs. Creation of a community services planning group with the City's community services department to help look at additional classes. An attend to strengthen the partnership.
5. Financial Plan - Provide an explanation of the overall financial plan including:	3.5	Net revenue remains in the building and with the YMCA, rather than going to the City. Currently YMCA decides how to spend money, not City; open to changing that. Operating deficits would be covered by the YMCA and not the City. Scholarships funded through nonmember rates in part; YMCA suggested the best way to look at scholarships is revenue not collected. YMCA acknowledged that they may need to either increase member rates or increase actual revenues (by adding members or expansion) to maintain the static net. No financial risks to City.
6. Maintenance Plan	3.5	YMCA pays a significant amount of maintenance and will continue to maintain as the building ages. YMCA not planning to maintain building structure, external and internal walls, roof, electrical and plumbing. Exception came in after interview from YMCA that they will pay for some plumbing. YMCA indicated there was a provision (in the operating agreement?) that the YMCA and City would share revenues; but indicated that early on in the working relationship with City, both sides agreed to put net revenue back into the facility. Mr. Hall indicated there was agreement to put the funds back into the facility. Moving forward YMCA agreed to work in partnership with the City to address where the funds get used.

7. Compensation	3.5	Existing contract allows for 15% of management support fees. The new YMCA proposal shows 11% which should be confirmed or lowered through negotiation. Later on in interview, Ms. Rayback says the 13% range. Later, Mr. Hall indicated that the YMCA would cover all deficits and limit the overhead and management fee to 11% of adjusted gross revenue. YMCA offered to put \$250,000 in a maintenance reserve fund. Mr. Hall indicated that this would be part of the agreement. (is that amount part of revenue however and if so is that no city's decision?)
8. Other	2	I appreciate the fact that the YMCA brought up expansion. YMCAs proposal is not contingent upon expansion. YMCA indicated that a 10 mil dollar expansion would cost about \$9 to the average Sherwood homeowner.
References (15 points max)		
No fewer than three references from accounts where Proposer is currently or has previously provided full time, onsite management	0	No references discussed
Budget/Financial Proposal (25 points max)		
Provide profit and loss statements for facilities managed in past 3 years, in sufficient detail that represents a fair and accurate portrayal as to the financial viability of the organization to run such a facility in a financially sustainable way. At least one example for a facility Proposer currently operates.	20	Profit and Loss discussed. YMCA indicated that they had not had discussions with the school district about expanding the pool, however YMCA indicated they would welcome a discussion with the SSD and City. YMCA budget shows no financial liability for city. However, YMCA's management budget is approximately \$300,000 per year vs. \$192,000 per year for HF. Same considerations regarding written financial proposal are made here.
TOTAL INTERVIEW SCORE		76.5

Proposer Name: Health Fitness

Evaluator Name: Jennifer Kuiper

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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	See accompanying spreadsheet for detailed notes	30	26
Proposed Programming / Operational Plan	See accompanying spreadsheet for detailed notes	30	29.5
References	See accompanying spreadsheet for detailed notes	15	15
Budget/Financial Proposal	See accompanying spreadsheet for detailed notes	25	15
	Total:	100	85.5

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Interview Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	See accompanying spreadsheet for detailed notes	30	30
Proposed Programming / Operational Plan	See accompanying spreadsheet for detailed notes	30	27
References	See accompanying spreadsheet for detailed notes	15	0
Budget/Financial Proposal	See accompanying spreadsheet for detailed notes	25	15
Total:		100	72

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Evaluation: Written Proposal		
Respondent: Health Fitness		
Reviewer: Jennifer Kuiper		
Criteria	Proposal Score	Notes
Introductory Letter (not scored, but considered)		
Letter addressed to City's Project Manager, include Proposer's name, and printed name, title, phone number and email address of officer authorized to represent proposal in any correspondence, negotiations, and contracting signing	Provided	Three page letter. Well written, easy to read. All information relevant.
Letter to include address of the office that will be providing the service and the project manager's name title telephone number and email address.	Provided	
Address Proposers understanding of the work to be accomplished	Provided	
willingness and commitment to provide services offered	Provided	
brief outline of Proposer's strengths	Provided	
description of why Proposer believes organization should be selected	Provided	
Proposers federal and state tax ID Numbers, and state of incorporation	Not Provided	
Signed by Proposer	Provided	
Overall Experience (Organization Experience and Qualifications) - 30 points max		
Provide a profile of organization and describe legal structure, principal officers and organization structure.	5	All information provided. Concise, clear, Organizational Chart provided.
Provide copy of any organization profile, sales brochure or other documentary information pertaining to organization	5	Information not included in this section, but was provided.
Provide resumes of key personnel including proposed facility manager and principals of Proposer's organization	4	No facility manager name provided as requested in RFP.
Provide the year and month when Proposer's organization was formed	5	
Provide a complete and detailed history of Proposers facility management experience over last five years. Include contact information	3	Good chart but no accompaning discussion.
Provide a list of facilities managed by Proposer on behalf of clients. Include contact information.	4	Had to look for this information in proposal.
Subtotal Score	26	
Proposed Programming/Operational Plan - 30 points max		
Possible scores up to 1 per category		
1. Management Plan: Provide explanation of overall philosophy on how Proposer would manage and operate facility including:		
overview of timeline of crucial milestones, and description of roles and responsibilities	1	Thorough discussion of transition plan. Well thought out.
suggested management organization chart of key management of the facility, identifying all full time and part time positions and their operational roles	1	Very good organizational chart.
a description of the reporting structure between facility management and corporate offices, and to the City of Sherwood. Describe proposed form of governance for facility	1	Proposer discusses setting up a committee.
Provide information on the operational performance of comparable rec facility that is relevant to the proposal. Include a least one comparable community to the City of Sherwood with a public agency as a partner	1	HF's Bethel facility was used to illustrate comparison with Sherwood facility
Operational reports to be provided on a quarterly basis	1	
	5	
2. Marketing Plan - Provide an explanation of the overall philosophy to market the facility including		
Overview of marketing and promotional concept that will further goals of the city as a premier venue and maximize the economic impact to the region	0.5	No discussion of how marketing directly relevant to Sherwood
A description of proposers approach to booking scheduling promoting, advertising, and marketing events, programs, and services	0.75	Online class sign ups would not utilized by most seniors using classes.
identification of any competing facilities managed by Proposer.	1	
Identification of any synergies, alliances, key relationships, and other marketing opportunities Proposer will established between other facilities it manages and how these could benefit the Sherwood Facility	0.75	Sherwood staff would have access to including continuing education credits, perferred purchasing program for equipment.
sponsorship strategies	0.5	No sponsorship strategies except to say they will work with city to define those.
	3.5	

3. Staffing		
Describe your personnel management philosophy and describe the steps you will take to ensure that only individuals of the highest quality are employed to provide recreational services	1	I like the internal promotion and transfer philosophy as well as employee referrals. HF provided a good list of standard qualifications for staff that sets a high base line for staff hires.
Describe your philosophy on retaining these highly qualified individuals	1	Good employee retention strategies. A highlight is reimbursement to employees for certifications directly related to job, and reimbursement for tuition for classes directly related to job.
Provide a staffing plan for facilities showing coverage during a normal operating day	1	Detailed staffing spreadsheet provided.
Provide a hiring plan for initial start up	0.75	No hiring plan provided, but HF indicates that it will retain current onsite staff per City's instruction and would work to implement a seamless staff transition. Good ideas regarding existing staff onboarding and transition.
Provide a copy of a current employee handbook and/or regulations	0.75	Provided copy of the table of contents of employee handbook, not entire book since it is an e-Manual.
	4.5	
4. Program or Curriculum		
Describe proposed hours of operation	1	Keeps same hours
Describe the services you would provide to the public	0.75	Table is a little unclear, for instance is that 62 hours per week or 62 classes per week.....
Provide details on how you would design, implement, administer, and evaluate high quality operations	1	Good and thorough discussion
Provide a statement of the educational/guiding philosophy by which the services would be operated if the Proposer were awarded the contract.	0.5	No community aspect offered in their philosophy
Describe how you would evaluate the quality of services and programs on an ongoing basis	1	Robust program for evaluating quality of services
	4.25	
5. Financial Plan - Provide an explanation of the overall financial plan including		
A spreadsheet model that displays revenue and expenditure categories in dollar figures by fiscal year of July 1 to June 30, beginning with the 1st year of operations and carried out a minimum of five years. The spreadsheet model will clearly identify the operating net income each fiscal year, with a narrative explanation of how deficits will be funded or gains will be utilized.	0	Excellent spreadsheet provided with proposal. However, Net losses over the next five years, totalling over \$700K. Financial plan includes full time Marketing Person.
Revenue and expenditure assumptions should be clearly footnoted and explained	1	Good explanations on footnotes
A narrative summary of the Proposer's strategy for minimizing the annual operating expenses and maximizing the annual operating revenues. The proposed strategy should be based on Proposer's existing understanding of similar operations and its overall approach for maximizing revenues and minimizing expenses.	1	Provided a good summary of expense minimization measures and revenue maximization measures. Including "value added" membership experiences. HF plans to use program funds for scholarship programs by driving enough new membership and program revenue to make the program self-supporting. Would need to further discuss with City.
A proposed strategy for a scholarship program and approximate amount of funds set aside each year for scholarships	0.75	
A summary of Proposer's proposed strategy for maximizing advertising and sponsorship sales for the facility	0.5	Strategy includes review and renegotiation of existing sponsorship agreements (are there any?) and an audit of all available sponsorship opportunities. Inventories on all assets would be taken.
User Fee schedule, including a differentiation between residents of Sherwood and non resident:	1	Remains the same
	4.25	
6. Maintenance Plan		
The Maintenance Plan must consist of daily upkeep and well as maintaining the major systems and infrastructure of the facility. How the Maintenance Plan is foreseen to be funded must also be included.	4	HF provides dedicated maintenance staff including a full time Facility Maintenance Manager and part time maintenance attendants and custodians.
	4	
7. Compensation		
Provide an outline of a potential compensation proposal should Proposer be selected to operate and manage the facility	4	Annual management fee of \$192,000.00
	4	
8. Other		

Please include any other information that would be applicable to Proposer's complete operational plan. This may include alternative proposals.	0	No other information provided.
Subtotal Score	0	
References (15 points max)		
No fewer than three references from accounts where Proposer is currently or has previously provided full time, onsite management	15	References Provided. Good references. Good comments.
Subtotal Score	15	
Budget/Financial Proposal (25 points max)		
Provide profit and loss statements for facilities managed in past 3 years, in sufficient detail that represents a fair and accurate portrayal as to the financial viability of the organization to run such a facility in a financially sustainable way. At least one example for a facility Proposer currently operates.	15	Budget proposal was complete and well thought out; however, budget shortfalls over the course of five years total over \$700K to be paid by the City.
Subtotal Score	15	
TOTAL WRITTEN PROPOSAL SCORE	85.5	

Evaluation: Interview		
Respondent: Health Fitness		
Reviewer: Jennifer Kulper		
Criteria	Interview Score	Notes
Overall Experience (Organization Experience and Qualifications) - 30 points max		
	30	HF thoroughly responded to all questions asked during the interview, followed by a written response to questions later on. HF has been in the business for 40 years and services a variety of communities, recreational centers, colleges, universities, and corporate clients. About 500,000 members. HF focused their discussion on what they do Growing Healthy Populations., creating aculte that enables people to take healthy behanor serioius and providing a personalized path for well ness.
Proposed Programming/Operational Plan - 30 points max		
1. Management Plan	4	HF would adopt the city's values and mission. HF assures City it woudl work to make transition easy, stating that they have four of their major transitions completed. As far as decision-making, they understand that with an Advisory Board, they want a diverse group of stakeholders and that it would not be an HF decision but one made by the coummunity and the city.
2. Marketing Plan	4	HF has no specific brand, HF indicated they are a silent partner that works with their members and their clients on branding. Their approach to marketing is to determine what works at an individual center. They have a robust marketing group with corporate support. Marketing Manager would be onsite full time.
3. Staffing	4	Staff transition planning is a big piece for HF and they have done a large number of transitions in the past 5 years. They would start on staff transitioning asap.
4. Program or Curriculum	4	Value added programming - HF doesn't come in and change something just to change it. HF indicated that in a lot of centers they are heavily invested in the communities they serve. HF shared various types of events they host and said money raised stays in the communities. Examples were provided. HF represents themse,ves as the brand or prpgram of the facility and their marketing program can help develop this.
5. Financial Plan	2	HF intends to conduct fundraising as the operator of the facility and program moving forward. At no additional fee other than the management fee of 192, 000. HF will work with the City collaboratively on fundraising. Due to some unknowns HF could not project positive revenue within first 3 years but shows a profit in year 4.

6. Maintenance Plan	4	HF indicated they develop 3-5 year plans and evaluate the financial benefits of equipment lease versus purchase and have national purposing programs with key pricers, passing on 100 percent of discounts onto the City.
7. Compensation	5	HF indicated that their interest in the business is the fixed management fee. Beyond the management fee, HF indicated that the profits go back to the City to be put back into programming and equipment. The City would be incharge of the revenues generated with HF in a consultative position.
8. Other	0	No other topics offered
References (15 points max)	0	References not discussed
Budget/Financial Proposal (25 points max)	15	Thorough Proforma presented over 5 years. Proforma was revised at request of Council to account for a no-net loss type of operation. Revised pro format shows a net loss of \$480,000.40 over five years instead of the \$778,072 over five years. Still, a tough budget to adjust to given projected community needs in the future.
GRAND TOTAL SCORE INTERVIEW		72

Proposer Name: THPRD

Evaluator Name: Jennifer Kuiper

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Recreational and Aquatic Center Operations and Management Services

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

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Overall Experience		30
Proposed Programming/Operational Plan		30
References		15
Budget/Financial Proposal		25
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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	See accompanying spreadsheet for detailed notes	30	25
Proposed Programming / Operational Plan	See accompanying spreadsheet for detailed notes	30	19.25
References	See accompanying spreadsheet for detailed notes	15	0
Budget/Financial Proposal	See accompanying spreadsheet for detailed notes	25	0
	Total:	100	44.25

Note: This form is subject to Oregon Public Records Law

Interview Evaluation

Criteria	Notes	Max Points	My Score
Overall Experience	See accompanying spreadsheet for detailed notes	30	25
Proposed Programming / Operational Plan	See accompanying spreadsheet for detailed notes	30	15
References	See accompanying spreadsheet for detailed notes	15	0
Budget/Financial Proposal	See accompanying spreadsheet for detailed notes	25	10
Total:		100	50

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Evaluation: Written Proposal		
Respondent: THPRD		
Reviewer: Jennifer Kuiper		
Criteria	Proposal Score	Notes
Introductory Letter (not scored, but considered)		
Letter addressed to City's Project Manager, include Proposer's name, and printed name, title, phone number and email address of officer authorized to represent proposal in any correspondence, negotiations, and contracting signing	Provided	Bare minimum provided in cover letter. Could not determine THPRD's level of interest or desire in serving the community of Sherwood.
Letter to include address of the office that will be providing the service and the project manager's name title telephone number and email address.	Provided	
Address Proposers understanding of the work to be accomplished	Not provided	
willingness and commitment to provide services offered	Not provided	
brief outline of Proposer's strengths	Not provided	
description of why Proposer believes organization should be selected	Not provided	
Proposers federal and state tax ID Numbers, and state of incorporation	Provided	
Signed by Proposer	Provided	
Overall Experience (Organizational Experience & Qualifications) - 30 points max		
Provide a profile of organization and describe legal structure, principal officers and organization structure.	5	Good summary. Concise. Organizational chart provided.
Provide copy of any organization profile, sales brochure or other documentary information pertaining to organization	4	Lots of documentation, but no specifics on applicability to Sherwood.
Provide resumes of key personnel including proposed facility manager and principals of Proposer's organization	3	Resumes of key personnel were provided, with the exception of the facility manager. No specific facility manager proposed
Provide the year and month when Proposer's organization was formed	4	Provided year, no month
Provide a complete and detailed history of Proposers facility management experience over last five years. Include contact information	4	Some information provided in text, the rest provided in attached Fact Sheet.
Provide a list of facilities managed by Proposer on behalf of clients. Include contact information.	5	
Subtotal Score	25	
Proposed Programming/Operational Plan (30 points max)		
Possible scores up to 1 per category		
1. Management Plan: Provide explanation of overall philosophy on how Proposer would manage and operate facility including:		
overview of timeline of crucial milestones, and description of roles and responsibilities	0.5	Had good overall descriptions of roles and responsibilities, THPRD would use an existing Programs Functional Plan. No timeline review of crucial milestones for Sherwood facility.
suggested management organization chart of key management of the facility, identifying all full time and part time positions and their operational roles	0.5	Had a lot of charts in proposal, but nothing specific to Sherwood. Would develop a specific staffing plan.
a description of the reporting structure between facility management and corporate offices, and to the City of Sherwood. Describe proposed form of governance for facility	0.5	Reporting structure described between facility management and corporate for existing facilities. Only the briefest of comments regarding reporting to City of Sherwood and no specific form of governance for our facility other than what they already do for the rest of the facilities within the THPRD.
Provide information on the operational performance of comparable rec facility that is relevant to the proposal. Include a least one comparable community to the City of Sherwood with a public agency as a partner	1	Used Conestoga facility as appropriate comparable for Sherwood facility
Operational reports to be provided on a quarterly basis	1	
	3.5	
2. Marketing Plan - Provide an explanation of the overall philosophy to market the facility including:		
Overview of marketing and promotional concept that will further goals of the city as a premier venue and maximize the economic impact to the region	0.5	Overall plan good, but nothing specific to Sherwood; they would develop one.
A description of proposers approach to booking scheduling promoting, advertising, and marketing events, programs, and services	0.5	"Off the shelf" response, no discussion on how the Sherwood facility would be folded into the marketing plan
identification of any competing facilities managed by Proposer.	0.75	Information was provided but it was in the wrong location per the RFP, lack of attention to detail here.
Identification of any synergies, alliances, key relationships, and other marketing opportunities Proposer will established between other facilities it manages and how these could benefit the Sherwood Facility	0.5	"Off the shelf" response, no specific discussion regarding synergies, etc.
sponsorship strategies	0	No sponsorship strategies provided, only suggested that one be developed. Not sure what they were talking about.
	2.25	

3. Staffing		
Describe your personnel management philosophy and describe the steps you will take to ensure that only individuals of the highest quality are employed to provide recreational services	1	Competitive compensation packages
Describe your philosophy on retaining these highly qualified individuals	1	training, professional organizations, etc.
Provide a staffing plan for facilities showing coverage during a normal operating day.	1	
Provide a hiring plan for initial start up	0.5	Provided hiring chart showing coverage, but not a hiring plan
Provide a copy of a current employee handbook and/or regulations	0.5	Only parts provided
	4	
4. Program or Curriculum		
Describe proposed hours of operation	1	
Describe the services you would provide to the public	0.5	"Off the shelf" response, nothing specific to Sherwood, or how existing services provided would be applied to Sherwood.
Provide details on how you would design, implement, administer, and evaluate high quality operations	0.5	"Off the shelf" response, nothing specific to Sherwood, or how existing services provided would be applied to Sherwood
Provide a statement of the educational/guiding philosophy by which the services would be operated if the Proposer were awarded the contract.	1	Nice philosophy. Inclusionary
Describe how you would evaluate the quality of services and programs on an ongoing basis	1	
	4	
5. Financial Plan - Provide an explanation of the overall financial plan including:		
A spreadsheet model that displays revenue and expenditure categories in dollar figures by fiscal year of July 1 to June 30, beginning with the 1st year of operations and carried out a minimum of five years. The spreadsheet model will clearly identify the operating net income each fiscal year, with a narrative explanation of how deficits will be funded or gains will be utilized.	0	Large projected deficits, burdening Sherwood budget. No discussion of how deficit will be funded except that the City would pay for any losses
Revenue and expenditure assumptions should be clearly footnoted and explained	0.5	The footnotes are not very explanatory, and some line item explanations overlap
A narrative summary of the Proposer's strategy for minimizing the annual operating expenses and maximizing the annual operating revenues. The proposed strategy should be based on Proposer's existing understanding of similar operations and its overall approach for maximizing revenues and minimizing expenses.	1	Good cost recovery methodology with good explanation of financial sustainability.
A proposed strategy for a scholarship program and approximate amount of funds set aside each year for scholarships	0	No strategy proposed. THPRD recognized that their existing strategy for scholarships is based on their taxing district and must exclude Sherwood.
A summary of Proposer's proposed strategy for maximizing advertising and sponsorship sales for the facility	0	No summary of a proposed strategy to maximize advertising or sponsorship sales identified in proposal.
User Fee schedule, including a differentiation between residents of Sherwood and non residents	0	Provided but almost doubles fee schedule from existing member fees
	1.5	
6. Maintenance Plan		
The Maintenance Plan must consist of daily upkeep and well as maintaining the major systems and infrastructure of the facility. How the Maintenance Plan is foreseen to be funded must also be included.	4	THPRD indicates that maintenance plan for Sherwood would be similar to Conestoga and they provided example. Nothing specific discussed.
	4	
7. Compensation		
Provide an outline of a potential compensation proposal should Proposer be selected to operate and manage the facility	0	Not clear on compensation. City funds all losses and profits are split.
	0	
8. Other		
Please include any other information that would be applicable to Proposer's complete operational plan. This may include alternative proposals.	0	No other information provided
	0	
Subtotal Score	19.25	
References (15 points max)		
No fewer than three references from accounts where Proposer is currently or has previously provided full time, onsite management	0	No references provided. Even though THPRD operates all its own facilities, it should have made a statement as such in the RFP, or provided references from vendors, users, groups, somebody.
	0	
Subtotal Score	0	
Budget/Financial Proposal (25 points max)		
Provide profit and loss statements for facilities managed in past 3 years, in sufficient detail that represents a fair and accurate portrayal as to the financial viability of the organization to run such a facility in a financially sustainable way. At least one example for a facility Proposer currently operates.	0	No profit and loss statements were provided.
	0	
Subtotal Score	0	
TOTAL WRITTEN PROPOSAL SCORE	44.25	

Evaluation: Interview		
Respondent: THPRD		
Reviewer: Jennifer Kuiper		
Criteria	Interview Score	Notes
Overall Experience (30 points max)		
	25	THPRD has great overall experience not just in managing facilities but, as a parks and recreation district, outdoor parks, including skate parks, dog parks, and nature parks and lakes and community gardens, and they operate a senior center. Great experience. They spend resources on adaptive sports and facilities. Place a high emphasis on staff development. Staff participates in leadership Academy.
Proposed Programming/Operational Plan (30 points max)		
up to roughly 4 pts given per subcategory		
1. Management Plan: Provide explanation of overall philosophy on how Proposer would manage and operate facility including:	3	THPRD committed to work with city staff to develop priorities and goals. THPRD acknowledged this would be their first transition project.
2. Marketing Plan - Provide an explanation of the overall philosophy to market the facility including:	2.5	THPRD expects city staff to help develop marketing plan.
3. Staffing	3.5	THPRD did not offer onboarding of existing staff until it was asked and then they indicated they would consider it, if it was a priority of the city.
4. Program or Curriculum	4	They acknowledged that although they are committed to accommodating low income people, that it is through a scholarship funded through their Park Foundation. A new funding program would be needed for Sherwood and indicated they would work with city staff on how to do that.
5. Financial Plan - Provide an explanation of the overall financial plan including:	0	City would be required to fund any operating loss and capital. Sherwood residents would not be given member rates to THPRD other facilities because Sherwood is not within the taxing district. THPRD projected revenues as significantly lower than other respondents, with a higher membership fee than the others. THPRD believed that the industry standard was higher for membership rates than what was currently being charged at the Sherwood facility. If THPRD had used existing membership prices, the operating loss would be even higher. Additional expenses including new equipment would be the responsibility of the City. Net operating losses generally increase over the years.
6. Maintenance Plan	2	Some discussion of maintenance but it was not a clear discussion to me since THPRD indicated that maintenance and utility costs are not included in Conestoga's budget, the comparable they were using for Sherwood. City would be expected to pay for equipment
7. Compensation	0	Net operating losses. No discussion of compensation
8. Other	0	THPRD confirmed no plans to expand their operating district. They envision district expanding to the north of Highway 26 to Bethany and southwest to Cooper Mountain. No plans to expand to Tigard, Tualatin, or Sherwood. Based on interview overall, of all the respondents, THPRD would be looking to the City staff the most to do a lot more than what the staff has the current bandwidth to absorb.
Subtotal	15	
References (15 points max)	0	No Discussion of references
Budget/Financial Proposal (25 points max)		
	10	City would be required to fund any operating loss and capital. Sherwood residents would not be given member rates to THPRD other facilities because Sherwood is not within the taxing district. THPRD projected revenues as significantly lower than other respondents, with a higher membership fee than the others. THPRD believed that the industry standard was higher for membership rates than what was currently being charged at the Sherwood facility. If THPRD had used existing membership prices, the operating loss would be even higher. Additional expenses including new equipment would be the responsibility of the City. Net operating losses generally increase over the years.
TOTAL INTERVIEW SCORE	50	

Proposer Name: Sports Facilities Management

Evaluator Name: Jennifer Kuiper

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	Overall experience was provided with approximately 11 facilities presented.	30	25
Proposed Programming / Operational Plan	Resumes provided. Operation plan was good but not enough specifics. Management services were bulleted but no information on applicability to Sherwood facility. Some of the bullets did not apply to Sherwood, showing lack of attention to our facility needs. The marketing plan seemed to be "off the shelf" with no specific reference to Sherwood market. Not enough information on staffing and no information regarding onboarding or transition	30	20
References		15	12

Note: This form is subject to Oregon Public Records Law

	References provided with contact information. No letters of reference, etc provided.		
Budget/Financial Proposal	Financial plan contained no profit and loss statements and no proforma. Noncompliant proposal.	25	0
Total:		100	57

Note: This form is subject to Oregon Public Records Law

Interview Evaluation – Not Interviewed

Criteria	Notes	Max Points	My Score
Overall Experience			
Proposed Programming / Operational Plan			
References			
Budget/Financial Proposal			
Total:		100	

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Recreational and Aquatic Center Operations and Management Services

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1. An evaluation of the written proposal.
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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	Overall experience is with pools.	30	10
Proposed Programming / Operational Plan	No Resumes provided. Marketing and Programming discussions were not geared towards Sherwood facility at all. Very "off the shelf". Disappointing.	30	10
References	No references	15	0
Budget/Financial Proposal	Nothing provided.	25	0
Total:		100	20

Note: This form is subject to Oregon Public Records Law

Interview Evaluation – Not Interviewed

Criteria	Notes	Max Points	My Score
Overall Experience			
Proposed Programming / Operational Plan			
References			
Budget/Financial Proposal			
Total:		100	

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