



# **Glendoveer Golf Course:**

## **Operation and market assessment, business plan recommendations and design/cost estimate services**

**RFP 11-1795**

**Metro Sustainability Center**

600 NE Grand Ave.  
Portland, OR 97232  
503-797-1700

**Project Manager**

Corie Harlan  
Corie.harlan@oregonmetro.gov  
503-797-1764

Notice is hereby given that proposals for RFP 11-1795 for *Glendoveer Golf Course: Operation and market assessment, business plan recommendations and design/cost estimate services* shall be received by Metro, 600 NE Grand Avenue, Portland OR 97232 until 4:00 PM on January 28, 2011. It is the sole responsibility of the proposer to ensure that Metro receives the Proposal by the specified date and time. All late Proposals shall be rejected. Proposers shall review all instructions and contract terms and condition

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### Appendices

#### Appendices can be accessed on Metro's FTP site:

[ftp://ftp.oregonmetro.gov/dist/parks/Glendoveer/OpAssess\\_BusinessPlanRFP/](ftp://ftp.oregonmetro.gov/dist/parks/Glendoveer/OpAssess_BusinessPlanRFP/)

Appendix A – Glendoveer Golf Course Analysis, DesignWorkshop, 2008

Appendix B – Salmon-Safe site assessment

Appendix C – Glendoveer maps and photos

Appendix D – Metro's Sustainability Plan for Internal Operations, 2010

Appendix E – Pilot Salmon-Safe Certification Standards for Golf Courses

Appendix F - Glendoveer Golf Course: Operational Analysis Golf Course Audit & General Recommendations, OB Sports, 2008

Appendix G - Glisan Street Recreation Inc, Financial Statements w/ Independent Auditor's

Report, 2008

Appendix H – Current Glendoveer Operation contract

## **I. INTRODUCTION**

Metro, the regional government that serves 1.5 million people who live in the 25 cities and three counties of the Portland metropolitan area, provides planning and other services that protect the nature and livability of our region. For more information, visit [www.oregonmetro.gov](http://www.oregonmetro.gov).

The work detailed in this RFP will be one component of a more extensive, on-going Glendoveer Golf Course Facility Assessment and Business Plan project. Metro, with the help and expertise of internal staff and consultants, will inform the Facility Assessment and Business Plan project process through the preparation of a business plan, analysis of existing and potential capital facilities renovations, and operation and maintenance recommendations for the Glendoveer Golf facility. Metro is undertaking this Facility Assessment and Business Plan project to help guide the development and award of a new contract to operate the facility starting in 2013. At the end of this project, Metro will incorporate these findings and recommendations, as well as other relevant information to develop a clear, fiscally-sound operating contract and investment strategy for capital improvements for Glendoveer. It is Metro's intention to develop a more efficient, sustainable, and profitable operation that better represents the Metro brand and is more responsive to community needs. The purpose for this request for proposals is to obtain the following services to inform the Facility Assessment and Business Plan project:

1. Golf course market analysis
2. Operation assessment and business plan recommendations
3. Conceptual design and cost estimate services

Work products, information and deliverables in each of these areas will directly inform the others, so the degree of integration and collaboration needed between these service areas will be exceptionally high.

Work related to an irrigation assessment and a public involvement plan will be occurring simultaneously by other consultants over the course of the project. Metro will integrate this collective body of consultant work with staff work products in final project deliverables. Because this work is highly interconnected and consultant work will inform and improve other consultant deliverables, Metro expects all consultants involved with the project to work collaboratively and share information, findings, and materials as requested by the project manager when appropriate.

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### II. BACKGROUND

Glendoveer Golf Course, located at 14015 NE Glisan Street in Portland, Oregon, was acquired by Metro from Multnomah County in 1996 as part of a transfer of assets that included the Expo Center, regional parks, pioneer cemeteries and Gleason and Chinook boat ramps. As the highest revenue generating facility transferred, Glendoveer is an important economic asset that allows Metro to operate these other transferred properties. The Glendoveer property contains 242 acres of land zoned for parks and open space. The site includes two 18-hole golf courses, two parking lots, four covered tennis courts, a restaurant, driving range, clubhouse (pro-shop), and a public soft-surface recreational trail. Metro specifically manages and maintains the fitness trail, several wooded areas, and the northeastern parking lot. The site is serviced by two domestic water wells on the property. Over 100,000 rounds (nines) of golf are played annually at this public facility. The current operator, Glisan Street Recreation (GSR) has managed the facilities and property for over 40 years and the existing operation contract expires December 31, 2012. Metro's Sustainability Plan for Internal Operations and various site assessments recommend increased capital investment and use of sustainable management and operation practices are needed to maintain and enhance the long-term viability of the facility. Also, the property may have the potential to produce more revenue and better serve customers and the community.

Much of Glendoveer's infrastructure was built 20-30 years ago and is in need of upgrading or replacement. Known areas in need of improvement include the maintenance yard (specifically pesticide, waste and stormwater management systems), visitor and parking circulation, the irrigation system, golf course parking lot, fitness trail parking lot, tennis center, clubhouse (pro-shop) and trailhead bathroom facilities.

Metro values sustainability in facility operations, and strives to be a model for sustainable business practices. To this end, Metro has adopted long-term sustainability goals for internal operations, which are to be met by 2025 (See Appendix D). Metro envisions meeting these sustainability goals by integrating sustainable practices and systems into Glendoveer's capital projects, procedures, maintenance and operations now and in the future.

In 2008, Metro contracted with OB Sports and Design Workshop Inc. to perform a cursory level evaluation of the current condition of the Glendoveer Golf Course. They provided limited recommendations on the condition of the golf course, systems, capital assets, programming and equipment (See Appendix A & F). The course was recertified in 2009 as a Certified Audubon Cooperative Sanctuary by Audubon International. Salmon-Safe's rigorous, third-party certification for existing golf courses will ultimately be sought for the property. An initial site assessment was completed to better understand the requirements for certification (See Appendices B & E).

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### III. PROJECT GOAL AND OBJECTIVES

Over the course of the Glendoveer Facility Assessment and Business Plan project, Metro, with the help and expertise of internal staff and consultants, will prepare a business plan, analyze existing and potential capital facilities renovations, and provide operation and maintenance recommendations for the Glendoveer Golf facility in preparation for the development and awarding of a new contract to operate the facility in 2013. At the end of the Glendoveer Facility Assessment and Business Plan project, Metro will have a clear, fiscally-sound operating contract and investment strategy for capital improvements that result in a more efficient, sustainable, profitable operation that better represents the Metro brand and is more responsive to community needs.

Site improvements will need to be balanced with the need to preserve or improve the current annual revenue stream of approximately \$800,000 that is used to fund other park services.

With this in mind, the overall Facility Assessment and Business Plan project objectives are to:

- Procure a new, fiscally-sound, sustainability-focused operation and management contract for Glendoveer
- Inform and accelerate Metro's efforts to improve facility operations
- Identify and prioritize future site enhancements and capital investments, both for Metro and the operator of the facility
- Forecast costs and revenue, both long-term and short-term
- Identify and serve community needs; provide and improve community benefits and connectivity – the site and fitness trail should be safe, accessible and pedestrian-friendly
- Increase use of sustainable management and operation practices
- Protect water quality, fish and wildlife habitat

### IV. KEY ASSUMPTIONS

Key assumptions for this scope of work include:

- Initial thoughts are that the two eighteen-hole golf courses will remain on site. However, if the business plan indicates that changes to the golf course design or layout are desirable or advantageous in meeting Metro's goals for the property, the nature, extent and cost of these potential changes should be identified in project deliverables. Specifically, the team can consider reductions in the number of holes, enlargement of facilities (such as the driving range) that would improve revenue, and the introduction of related facilities (such as a par-3 course).
- Three levels of analysis are sought: 'Minimum' – focused on renewal and replacement needs, this analysis and related design, costs and/or recommendations comprise

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addressing immediate issues within the existing site use and system, such as asset malfunctions/inefficiencies, code requirements, and ADA access. 'Average' – focused on incorporating building, site and/or course improvements that are focused on expanding revenue generating sources with cost effective changes to the site, this analysis and related design, costs and/or recommendations comprise addressing upgrades, investments and opportunities for improving the efficiency, sustainability, and/or flow/circulation of the facility's systems, courses and/or infrastructure. 'Extensive' – this analysis and related design, costs and/or recommendations will focus on the largest-scale changes that may involve or require major building construction and/or redesign to LEED Silver standards, investments and/or reconfiguring significant areas of the site and/or course.

- A complete golf course redesign is not needed. However, the scope for these tasks should include analysis or consideration of golf course design, changes or enhancements to play identified in the market assessment and/or that directly affect the business recommendations. This will not preclude future studies or alternative proposals from potential operators during the contractor selection phase.
- The existing function of the Ringside restaurant will remain but potential changes that improve user experience, flow and aesthetics of two outdoor patio spaces, the restaurant and the snack bar area should be assessed.
- The existing function of the driving range will remain the same. Operational changes and/or design recommendations may result from an evaluation of this revenue center.
- Any identified signage needs or recommendations should consist of a cursory narrative only.
- Facility Inventory: The facilities that will receive the most rigorous analysis during the conceptual design and cost estimate work and serve as focal points in the operation assessment and business plan recommendations are those where the potential for varying levels of capital investment and changes to programming are most likely. These facilities are listed below. It is assumed that most buildings/areas listed in this inventory will need some level of renovation or additional investment. See Appendix C for photos. These facilities include:
  - *Tennis center* - Currently, the tennis center is a low value building that occupies a large and central footprint in the building complex area. Evaluation of this revenue center should consider dollars generated per square foot, site flow and possible repurposing or removal of this building.
  - *Clubhouse and golf cart parking area* - The clubhouse and golf cart parking area are centrally located in the building complex and are in need of renovation. Evaluation should identify facility improvements needed to facilitate tournament play, better serve customers and improve site flow and aesthetics.

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- *Ringside restaurant facility* – Currently, the entrance to the clubhouse area conflicts with the back of the restaurant used for delivery and storage and this area is also poorly screened. Improvements that create better flow, a sense of arrival and better integrate golf and restaurant uses should be assessed. Indoor/outdoor relationships, including views, need to be reviewed.
- *Main parking lot* – The main parking lot has a traditional design that does not currently meet the City of Portland’s stormwater management requirements. Any repaving or changes to the parking lots will trigger and require compliance with the City’s updated standards. Parking lot assessment should incorporate stormwater management improvements, address trail crossing/pedestrian conflicts and connectivity, and consider parking needs, bike parking, circulation and access issues. This includes aesthetic and utilitarian issues related to ADA access, the entry sequence and flow, sidewalk connectivity and how vehicles and people access the site from the surrounding neighborhoods, streets and nearby transit options (MAX stop and bus stop).
- *Northeast (trailhead) parking lot* – The northeast parking lot also has a traditional design that does not currently meet the City of Portland’s stormwater management requirements. Any repaving or changes to the parking lots will trigger and require compliance with the City’s updated standards. Stormwater management improvements, parking needs, bike parking, circulation, access and connectivity with the fitness trail should be assessed.
- *Trailhead bathroom facilities* – Currently, the existing bathroom facilities that primarily serve Fitness trail users are comprised of multiple port-a-potties. Installation of permanent bathroom facilities with ADA access, sanitary sewer connections, improved trail user access and improved aesthetics should be assessed.
- *East and west golf courses* – A complete golf course redesign is **not** within the scope of this contract. However, if the market assessment and/or business models and recommendations identify missed revenue generating opportunities related to course layout and/or use, these should be incorporated into project deliverables.

## **V. DESIGN OBJECTIVES**

Designs for structures and site improvements should emphasize the over-arching principles of environmental stewardship, financial feasibility and community enhancement. The following are the design objectives that will need to be addressed, which should be reflected in cost estimates:

- The value of Glendoveer to the surrounding community should be recognized and the amenities that the property currently provides – golf/recreation opportunities; habitat

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restoration; fitness trail; and green space in an underserved and under-natured area; – should be preserved. Glendoveer is also an economic and aesthetic addition to the neighborhood; this should be considered and enhanced if possible.

- All structure recommendations should include sustainable design elements to decrease environmental impacts to the surrounding environment, help Metro meet its sustainability goals, protect water quality, reduce long-term maintenance and capital asset replacement costs, decrease the use of energy, efficiently use resources and provide educational opportunities to the public. This could include porous paving, permeable pavers, on-site detention of stormwater, solar, eco-roof elements and use of other low-impact development materials and construction techniques.
- Recommended site changes must be designed to provide integration of the highest level of environmental stewardship in any construction, maintenance and operation of the course to protect the natural features of the site and ensure that there are no additional risks to water quality or wildlife habitat. Metro will work to achieve the highest level of protection through the upgrading, maintenance and operation of the golf course. Metro will be applying for Salmon-Safe certification of the property.
- Address code compliance issues, such as City of Portland stormwater codes, building codes, ADA, etc.

### **VI. SCOPE OF WORK, PROJECT TASKS AND DELIVERABLES**

The proposer selected to provide the Glendoveer Golf Course Operation and market assessment, business plan recommendations and design/cost estimate services will be required to perform the following tasks and deliver the products described in this section. The specific services sought are:

1. Golf course market analysis
2. Operation assessment and business plan recommendations
3. Conceptual design and cost estimate services

Work products, information and deliverables in each of these areas will directly inform the others, so the degree of integration and collaboration needed between these service areas is exceptionally high. The consultant and/or team can expect to begin work immediately upon contract award and notice to proceed.

#### **Task 1: Review existing information and finalize work scope**

Review existing information relating to Glendoveer and its context, including but not limited to items listed in appendices. Attend one project kick-off meeting with Metro staff to clarify work plan and discuss programming needs, work parameters and schedule.

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### **Task 1 deliverables:**

- One project kick-off meeting with Metro staff
- Finalized work plan, schedule with project tasks broken down by phase and budget

### **Task 2: Golf market analysis**

The objective of this work is to:

1. Conduct a golf course market analysis to identify local, regional and national municipal golf trends and public golf operation norms, and;
2. Conduct local field research to gain an understanding of the market dynamics, fees, features and amenities which shape operating results at similar, competing publicly-operated courses.

These findings will be used to inform business strategies and/or capital investment recommendations that would potentially develop a niche market and/or increase Glendoveer's profitability. Thus, consultant should note impending or proposed changes to golf courses in the Greater Portland region – including City of Portland courses (Red Tail, Eastmoreland, Heron Lakes, Rose City), Colwood National, Persimmon and Gresham golf courses, and the expansion of the short course at McMenamin's Edgefield, and indicate how those changes might affect underlying business assumptions for Glendoveer. The final report will detail current and projected trends for national and local golf course markets related to green fees, play trends and future competitive supply of golf and tennis, characterization of target market groups and related strategies that offer the best potential to maximize revenue. It will also include local market information such as a green fee survey, tournament projections and rates, proposed improvement projects, closures and performance data at other courses, if known.

### **Task 2 deliverables:**

- Draft report of golf course market analysis for Metro staff review
- Final report

### **Task 3: Operations assessment and business plan recommendations**

The objective of this work is to perform a comprehensive operational review of the Glendoveer golf facility to provide Metro with an analysis of Glendoveer's strengths and weaknesses and clearly identify the types of changes, improvements and level and scale of investments needed. Analysis will be based on the assumption of a long term management contract being in place, and ideally would result in improved revenue performance and site improvements. Analysis will include performing a financial evaluation of the current contract, determining feasibility of acquiring private capital investment according to concepts defined in Task 4 of this RFP and identifying levels of risk and return to Metro. Analysis will also include incorporating findings from Task 2. A comprehensive evaluation of Glendoveer's golf course operations, management,

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physical conditions and capital needs will inform Metro's development of a recommended business plan, finance model and proposed contract/lease structure. The consultant will produce a final report with findings and recommendations generated from this operational and business review and analysis. This report will:

- detail a recommended business plan addressing items described in Task 3 below
- describe the condition of the facility, related challenges, opportunities, and trade-offs, and recommend prioritization of investments
- include recommendations on funding options for short and long term capital improvements at Glendoveer, with estimated costs and recommended phasing and timeline
- present potential finance, management and operation models, as well as contract options. For each alternative, provide analysis regarding the pros and cons of each, as well as examples of each model working successfully. Provide recommendation on models or options best suited for Glendoveer
- make clear how different projects, investments, changes to existing uses, facilities or operations will create and/or positively impact revenue generation
- incorporate and respond to relevant findings in Task 4 analysis and report.

Key assumptions for this work include:

- Initial assessments and recommendations should focus on providing big picture information and broad forecasts. The need for more detailed analysis for specific areas or recommendations may then be identified and/or requested by the Metro project team
- Potential funding sources identified (private/public financing) should have a maximum 20 year debt service
- Capital reserve of 3% (3% gross operating revenues put into reserve annually)
- Routine maintenance reserve of 3% (3% gross operating revenues put into reserve annually)
- Use expected 2013 interest rate assumptions
- Identify average inflation factor over 20 year period
- Capital investments and improvement plans to be based on architectural concepts and costs described in task 4 of this RFP

Operation and business assessment areas shall include:

- Financial analysis and revenue projections:
  - Gross income
  - Net operating income
  - Net cash flow statement

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- Income breakdown: rounds, merchandise, driving range, food and beverage, cart rental, lessons, etc. (Profit/loss statements)
- Direct and indirect revenue (identification and projections)
- Projected operating expenses and management fees
- Historical performance evaluation (last five years)
- Financial projections: YR 1-YR5, YR5-YR10, YR10-YR15
- Identification of underutilized and/or missed opportunities with current operation contract and business practices
- Gross income potential of individual profit centers (next 15 years):
  - Food & beverage
  - Clubhouse
  - Ringside restaurant
  - Driving range
  - Cart fleet
  - Tennis center
  - Fee structures based on Golf Rounds
  - Membership fees
  - Lessons
  - Merchandise
  - Other new/proposed retail or services
- Marketing guidance that provides an assumption of the minimal plan and related actions required by operator to achieve revenue projections and identifies opportunities to incorporate the Metro brand identity into the operation of the facility
- Capital improvement needs, including identification of appropriate capital investment that should be required of future operator, Metro or both. Provide capital improvement financing models and options with recommendation for preferred option (and logic behind the recommendation)
- Evaluation of three development options (minimum, average, extensive) outlined in Task 4, based on phasing of public improvements. Assess cost/benefit of improvements identified in three development options outlined in Task 4 (minimum, average, extensive)
- Management, lease and concession (including tournament/event catering) options for contract and fee structures
- Programs, facility and/or course improvements that could facilitate tournament play and/or other events (such as weddings) to maximize revenue generation and better serve patrons and the community
- Sustainable practices in the maintenance and operation of the facility including pesticide, waste and stormwater storage and management, integrated pest management and upgrades to the irrigation system
- Visitor, customer and parking circulation

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- Fitness trail parking lot and bathroom facility improvement and maintenance
- Leased equipment (golf carts, pull cart rentals, maintenance vehicles, etc.) essential to running the golf operation, replacement value of equipment and potential fleet upgrades
- Developing performance measures and metrics that will allow Metro to objectively evaluate operation of the facility

### **Task 3 deliverables:**

- One site visit that will include meeting with current operator and identified personnel
- Draft final report and business plan recommendations for review by Metro staff
- Up to two meetings with Metro staff to develop, analyze and finalize recommendations
- Final report and business plan recommendations

### **Task 4: Conceptual design and cost estimate services**

The objective of this work is to produce an Existing Conditions and Proposed Improvements Report that includes order of magnitude cost estimates and conceptual architectural renderings for potential structure, site and/or course improvements. Three distinct development options (minimum, average, extensive) with clear differentiations between amount of capital investment required for building, course and/or site changes or improvements, incorporation of sustainability features and quality of the finish will be provided. Renderings for the 'average' and 'extensive' options and cost estimates and site plans for all three options will provide stakeholders, community members, potential future operators and policy makers with a visual representation and associated cost premiums for these differing project approaches.

The conceptual design and cost estimate services shall include:

- **Facility inventory analysis** – The consultant will review the as-is physical condition and characteristics of buildings and spaces identified in the facility inventory. The consultant should provide an evaluation that provides general recommendations on structural integrity, accessibility, expected building life, functionality and similar for the facility inventory. The analysis should include both exterior and interior areas, and highlight code compliance and infrastructure issues as well. It should also identify any additional testing or studies needed. This work will build on an existing asset (renewal and replacement) inventory list created by Metro staff.
- **Recommend operational and programming changes to site** – As structures, revenue centers and site improvements are evaluated, the consultant should provide summary descriptions, recommendations and cost and revenue-based rationale for any improvements/changes, including but not limited to program changes, facility, course and site upgrades and/or removals, and layout reconfigurations.

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- **Review of site circulation and access** – Consultant will review existing parking lot configurations, vehicle and pedestrian flow patterns, site circulation and parking needed to optimize the appearance, performance and safety of the facility. Specifically, this work should address existing conflicts between vehicular access to site and pedestrian access and use of fitness trail. The consultant is expected to determine whether the site layout could be modified to make the facility more attractive to golf and restaurant patrons and trail users. Safety for pedestrians that use the trail and need safe passage through the parking area should be examined. Again, code compliance should be factored in. Recommendations for modifications or mitigation measures as appropriate should be clearly outlined.
- **Cost estimate study** – After determining the rough size and program demand for structures and/or site improvements in the analysis described above, the consultant should prepare cost estimates for the three distinct development options that reflect an appropriate response to site opportunities and constraints and Metro’s goals for sustainability. Clear differentiations between amount of capital investment required for building, course and/or site changes or improvements, incorporation of sustainability features and quality of the finish will be provided. The cost estimates will be based generally on the following guidelines: 1) minimum amount required; 2) average quality and finish given market alternatives (with the possibility for expansion or upgrade of facilities in the future) and 3) development of certified LEED Silver quality buildings (at a minimum). Impacts on revenue, long-term operations and the environment will need to be part of the analysis. In at least two of the options, Metro would like building and site design to consider and where appropriate, incorporate features like hardscape improvements that may include porous paving, permeable pavers, on-site detention of stormwater, solar, eco-roof elements and use of other low-impact development materials and construction techniques. Because the cost estimates are conceptual, it is appropriate to include a large contingency and a range of prices with suggested areas where savings could be achieved if necessary. All assumptions and contingencies shall be clearly identified. Cost estimates need to be all-inclusive and cover both soft and hard costs. Assume that these types of improvements will occur within 2-3 years of the new contract being in place (Jan. 1, 2013). Include costs and contingency amounts required to achieve LEED premiums, where practicable.
- **Architectural renderings** – Develop architectural rendering for the ‘average’ and ‘extensive’ development options to illustrate for policy makers and community members how buildings, course and/or site changes might be integrated into the property. Up to two presentation quality renderings will be produced for each of these two options. A site plan will also be produced for these two options. These renderings and site plans may not be reflective of the final designs that are developed as future projects move forward.

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Consultant will produce a final Existing Conditions and Proposed Improvements report that includes facility inventory analysis results, operation and programming recommendations, site circulation and access recommendations, and three development options described above. Specifically the three development options (minimum, average, extensive) will include:

- Cost estimates and narratives: Prepare cost estimates for three distinct development options. Providing a range of costs is appropriate. Narratives should detail the assumptions and descriptions of each option and the differing levels of investments, materials, sustainability features and quality of finish represented in each option. (1 electronic copy in PDF format, 1 hard copy)
- Renderings: Produce up to two presentation quality renderings for the 'average' and 'extensive' development options (PDF and e-mail size copies, as well as full-size boards for meeting presentations)
- Site plans: Produce one site plan for the 'average' and 'extensive' development options that includes elevations (PDF and e-mail size copies, as well as full-size boards for meeting presentations)

### **Task 4: deliverables**

- Up to three meetings with Metro staff throughout course of project to discuss/refine draft recommendations, cost estimates, assumptions and renderings
- Final Existing Conditions and Proposed Improvements report
- One presentation to Metro Council

### **Project tasks to be performed by Metro**

- Provide background reference materials and mapping materials
- Coordinate with all consultants and Metro team
- Coordinate access to other consultant work products and deliverables as needed
- Provide timely feedback on all materials to be reviewed
- Coordinate with current operator, stakeholders and community members
- Handle all media and public relations requests
- Perform other tasks as negotiated with consultant

## **VII. PROJECT SCHEDULE**

### **Operation assessment and design services timeline**

February 2011– Scope of work finalized, contract executed, Notice to Proceed

March 2011 – Meet with Metro staff to discuss program requirements

March/April 2011 – Financial analysis and operation assessment draft due

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- Market analysis/findings draft due
- Conceptual and cost estimate drafts due

April 2011 – Refine and finalize renderings and cost estimates

May 2011– Final conceptual design and cost estimate task 4 deliverables due

- Final market analysis task 2 deliverables due

May/June 2011 – Complete financial analysis and operations assessment

- Refine business plan recommendations, draft due

July 2011 – Final task 3 deliverables due

### **Overall Glendoveer Golf Course Facility Assessment and Business Plan project timeline**

January 2011 – All consultants under contract with Notice to Proceed issued by 2/28/2011

June 2011 – All deliverables due

July 2011 – Draft RFP for Golf Course operation

January 2012 – RFP finalized, RFP for operator advertised

December 31, 2012 – Existing operations contract expires, new operations contract in place

### **VIII. QUALIFICATIONS/EXPERIENCE**

Metro is seeking a consultant team that possesses a combination of creative, business and technical expertise to complete all portions of this work. The consultant team should possess expertise in the following disciplines: structural engineering, architecture, landscape architecture, sustainability, public and/or private golf course and venue design, golf course management, and golf facility operations, maintenance and business analysis. The consultant will have professional experience on projects of a similar size, nature and scope. Strong project management skills, a collaborative work style and project experience are important qualifications. References from previously completed projects are required.

### **IX. PROPOSAL INSTRUCTIONS**

- A. Submission of Proposals: Five (5) copies of the proposal shall be furnished to Metro addressed to:

Metro  
Sustainability Center  
RFP 11-1795  
Attn: Corie Harlan  
600 NE Grand Avenue  
Portland, OR 97232-2736

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Email submissions to [corie.harlan@oregonmetro.gov](mailto:corie.harlan@oregonmetro.gov) will also be accepted. The subject line of the email must indicate RFP 11-1795 Glendoveer Golf Course: Operation and market assessment, business plan recommendations and design/cost estimate services.

- B. **Deadline:** Proposals will not be considered if received after **4 p.m. on January 28, 2011.**
- C. **RFP as Basis for Proposals:** This Request for Proposals represents the most definitive statement Metro will make concerning the information upon which Proposals are to be based. Any verbal information that is not addressed in this RFP will not be considered by Metro in evaluating the Proposal.

Metro will hold a voluntary pre-proposal meeting at the Metro office 600 NE Grand Avenue, Portland, OR 97232-2736 from **2:00 to 3:30 p.m., Wednesday January 5, 2011** in room **501**. *Proposers are highly encouraged to attend.* Questions, answers and information covered during the pre-proposal meeting will be made available on-line.

All questions relating to this RFP should be addressed to Corie Harlan at 503-797-1764 or [corie.harlan@oregonmetro.gov](mailto:corie.harlan@oregonmetro.gov). Any questions, which in the opinion of Metro warrant a written reply or RFP addendum, will be furnished to all parties receiving this RFP. Deadline for questions is 4:00 p.m. on January 21, 2011.

- D. **Information Release:** All Proposers are hereby advised that Metro may solicit and secure background information based upon the information, including references, provided in response to this RFP. By submission of a proposal all Proposers agree to such activity and release Metro from all claims arising from such activity.
- E. **Minority and Women-Owned Business Program:** In the event that any subcontracts are to be utilized in the performance of this agreement, the Proposer's attention is directed to Metro Code provisions 2.04.100. Copies of that document are available from Procurement Office of Metro, Metro Regional Center, 600 NE Grand Avenue, Portland, OR 97232 or call (503) 797 1816.

**X. PROPOSAL CONTENTS**

The proposal should contain not more than 12 pages of written material (excluding biographies and brochures, which may be included in an appendix), describing the ability of the consultant to perform the work requested, as outlined below. The proposal should be submitted on 8 ½" by 11" letter size, recyclable, double-sided recycled paper (post consumer content), bound by staple or paper clip. No waxed or plastic page dividers or non-recyclable materials should be included in the proposal.

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The proposal should describe the project approach, qualifications and metrics for assessing results. All proposals should be in the following format:

### **Transmittal Letter**

Indicate who will be assigned to the project, who will be project manager, and that the proposal will be valid for ninety (90) days.

-- 1 page

### **Project Understanding and Approach**

Based on the contents of the RFP, briefly discuss how you or your team would approach the project and strategy for completing required tasks. Give a written explanation of your understanding of the effort needed to perform the requirements of the Contract, the ability to meet the timeline and to produce the products.

-- up to 4 pages

### **Project Consultant Demonstration of Expertise and Experience**

Indicate how your firm meets the experience requirements listed in section VIII of this RFP. List projects conducted over the past five years which involved services similar to the services required here. For each of these other projects, include the name of the customer contact person, his/her title, role on the project, and telephone number. Identify persons on the proposed project team who worked on each of the other projects listed, and their respective roles. Provide information on the availability of key staff.

--up to 4 pages

### **Budget/Cost Proposal**

Cost/Budget: The anticipated cost of the requested services herein has not been determined. The consultants proposal shall include the consultant's true estimated cost to perform the work irrespective Metro's budgeted funds for this work. This contract will be awarded as a not to exceed lump sum contract (including expenses), with monthly progress payments. Please provide a budget with hourly rates for key personnel and the number of hours by deliverable. Requested expenses should also be listed by item category. Metro expects to receive the Proposers most favorable rates.

--1 page

### **Diversity in Employment and Contracting**

Work Force Diversity – Describe your work force demographics (number of employees, race and gender) and the measurable steps taken to ensure a diverse work force,

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including company policies and practices that promote the hiring and retention of women and ethnic minorities.

Diversity in Contracting – Describe your history of working with diverse firms, including any MWESB-certified firms. Describe a project for which you worked with minorities, women or emerging small businesses. Please provide the project name, method used to achieve participation – for example, joint ventures, subcontracts or purchase of equipment or supplies from a certified firm – and the dollar amount or percentage of the project budget expended on such participation.

Diversity of Firm – Describe the ownership of your firm (e.g., fully minority owned) and whether or not your firm is certified by the State of Oregon as an MBE, WBE or ESB. Provide certification number, if applicable.

-1 page

**Exceptions to Personal Services Agreement and RFP (one page)**

Carefully review the Personal Services Agreement (“PSA”) attached hereto as Exhibit A and incorporated herein. This is the standard agreement that successful respondents to this RFP will be required to execute. RFP respondents wishing to propose any exceptions or alternative clauses to the PSA or to any specified criteria within this RFP must propose those exceptions or alternative clauses in their Proposal; future exceptions or alternative clauses will not be allowed. Proposed exceptions or alternative clauses should be accompanied by explanatory comments that are succinct, thorough and clear.

-1 page

**XI. CONTRACT CONDITIONS**

- A. Limitation and Award: This RFP does not commit Metro to the award of a contract, nor to pay any costs incurred in the preparation and submission of proposals in anticipation of a contract. Within each discipline listed, Metro may award one or more contracts. Metro reserves the right to waive minor irregularities, accept or reject any or all proposals received as the result of this request, negotiate with all qualified sources, or to cancel all or part of this RFP.
  
- B. Billing Procedures: Proposers are informed that the billing procedures of the selected firm are subject to the review and prior approval of Metro before reimbursement of services can occur. Contractor's invoices shall include an itemized statement of the work done during the billing period, and will not be

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submitted more frequently than once a month. Metro shall pay Contractor within 30 days of receipt of an approved invoice.

- C. Validity Period and Authority: The proposal shall be considered valid for a period of at least ninety (90) days and shall contain a statement to that effect. The proposal shall contain the name, title, address, and telephone number of an individual or individuals with authority to bind any company contacted during the period in which Metro is evaluating the proposal.
- D. Conflict of Interest: A Proposer filing a proposal thereby certifies that no officer, agent, or employee of Metro or Metro has a pecuniary interest in this proposal or has participated in contract negotiations on behalf of Metro; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer for the same call for proposals; the Proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.
- E. Equal Employment and Nondiscrimination Clause: Metro and its contractors will not discriminate against any person(s), employee or applicant for employment based on race, creed, color, national origin, sex, sexual orientation, age, religion, physical handicap, political affiliation or marital status. Metro fully complies with Title VI of the Civil Rights Act of 1964 and related statutes and regulations in all programs and activities. For more information, or to obtain a Title VI Complaint Form, see [www.oregonmetro.gov](http://www.oregonmetro.gov) or call (503) 797-1536.

## **XII. EVALUATION OF PROPOSALS**

- A. Evaluation Procedure: Proposals received that conform to the proposal instructions will be evaluated. The evaluation will take place using the evaluation criteria identified in the following section. Interviews may be requested for some or all proposers prior to final selection of firms.
- B. Evaluation Criteria: This section provides a description of the criteria that will be used in the evaluation of the proposals submitted to accomplish the work defined in the RFP.

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		<b>Percentage of Total Score</b>
—	<b>Project/Firm experience and project approach</b>	
1.	Project consultant demonstration of expertise and experience Business expertise (20%) Design expertise (15%)	35%
2.	Project understanding and approach	25%
—	<b>Budget/Cost Proposal</b>	
1.	Approach to assignment of costs by task	20%
2.	Commitment to budget and schedule parameters	5%
—	<b>Diversity in employment and contracting</b>	
1.	Work Force Diversity	5%
2.	Diversity in Contracting	5%
3.	Diversity of Firm	5%
		<b>100%</b>

**XIII. APPEAL OF CONTRACT AWARD**

Aggrieved proposers who wish to appeal the award of this contract must do so in writing within seven (7) days of issuance of the notice of intent to award by Metro. Appeals must be submitted to Darin Matthews, Procurement Officer, 600 NE Grand, Portland, Oregon 97232 and must state the specific deviation of rule or statute in the contract award. Metro will issue a written response to the appeal in a timely manner.

**XIV. NOTICE TO ALL PROPOSERS -- STANDARD AGREEMENT**

The attached personal services agreement is a standard agreement approved for use by the Office of Metro Attorney. This is the contract the successful Proposer will enter into with Metro; it is included for your review prior to submitting a proposal.

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Contract # \_\_\_\_\_

THIS AGREEMENT is between Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, located at 600 N.E. Grand Avenue, Portland, OR 97232-2736, and \_\_\_\_\_, referred to herein as "Contractor," located at \_\_\_\_\_.

In exchange for the promises and other consideration set forth below, the parties agree as follows:

1. Duration. This personal services agreement shall be effective \_\_\_\_\_ and shall remain in effect until and including \_\_\_\_\_, unless terminated or extended as provided in this Agreement.

2. Scope of Work. Contractor shall provide all services and materials specified in the attached "Exhibit A -- Scope of Work," which is incorporated into this Agreement by reference. All services and materials shall be provided by Contractor in accordance with the Scope of Work, in a competent and professional manner. To the extent that the Scope of Work contains additional contract provisions or waives any provision in the body of this Agreement, the Scope of Work shall control.

3. Payment. Metro shall pay Contractor for services performed and materials delivered in the amount(s), manner and at the time(s) specified in the Scope of Work for a maximum sum not to exceed \_\_\_\_\_ AND \_\_\_\_\_ /100THS DOLLARS (\$ \_\_\_\_\_).

4. Insurance.  
a. Contractor shall purchase and maintain at the Contractor's expense, the following types of insurance, covering the Contractor, its employees, and agents:  
(1) Broad form comprehensive general liability insurance covering bodily injury and property damage, with automatic coverage for premises, operations, and product liability, shall be a minimum of \$1,000,000 per occurrence. The policy must be endorsed with contractual liability coverage; and  
(2) automobile bodily injury and property damage liability insurance coverage shall be a minimum of 1,000,000 per occurrence.  
b. Metro, its elected officials, departments, employees, and agents shall be named as ADDITIONAL INSUREDS. Notice of any material change or policy cancellation shall be provided to Metro 30 days prior to the change or cancellation.

c. Contractor, its subcontractors, if any, and all employers working under this Agreement that are subject employers under the Oregon Workers' Compensation Law shall comply with ORS 656.017, which requires them to provide Workers' Compensation coverage for all their subject workers. Contractor shall provide Metro with certification of Workers' Compensation insurance including employer's liability. If Contractor has no employees and will perform the work without the assistance of others, a certificate to that effect may be attached, as Exhibit B, in lieu of the certificate showing current Workers' Compensation.

d. If required by the Scope of Work, Contractor shall maintain for the duration of this Agreement professional liability insurance covering personal injury and property damage arising from errors, omissions, or malpractice. Coverage shall be in the minimum amount of \$500,000.

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Contractor shall provide to Metro a certificate of this insurance, and 30 days' advance notice of material change or cancellation.

e. Contractor shall provide Metro with a Certificate of Insurance complying with this article, and naming Metro as an additional insured within fifteen (15) days of execution of this contract, or twenty-four (24) hours before services under this contract commence, whichever date is earlier.

5. Indemnification. Contractor shall indemnify and hold Metro, its agents, employees and elected officials harmless from any and all claims, demands, damages, actions, losses and expenses, including attorney's fees, arising out of or in any way connected with its performance of this Agreement, or with any patent infringement or copyright claims arising out of the use of Contractor's designs or other materials by Metro and for any claims or disputes involving subcontractors.

6. Ownership of Documents and Maintenance of Records. Unless otherwise provided herein, all documents, instruments and media of any nature produced by Contractor pursuant to this agreement are Work Products and are the property of Metro, including but not limited to: drawings, specifications, reports, scientific or theoretical modeling, electronic media, computer software created or altered specifically for the purpose of completing the Scope of Work, works of art and photographs. Unless otherwise provided herein, upon Metro request, Contractor shall promptly provide Metro with an electronic version of all Work Products that have been produced or recorded in electronic media. Metro and Contractor agree that all work Products are works made for hire and Contractor hereby conveys, transfers, and grants to Metro all rights of reproduction and the copyright to all such Work Products.

a. Contractor and subcontractors shall maintain all fiscal records relating to such contracts in accordance with generally accepted accounting principles. In addition, Contractor and subcontractors shall maintain any other records necessary to clearly document:

- (1) The performance of the contractor, including but not limited to the contractor's compliance with contract plans and specifications, compliance with fair contracting and employment programs, compliance with Oregon law on the payment of wages and accelerated payment provisions; and compliance with any and all requirements imposed on the contractor or subcontractor under the terms of the contract or subcontract;
- (2) Any claims arising from or relating to the performance of the contractor or subcontractor under a public contract;
- (3) Any cost and pricing data relating to the contract; and
- (4) Payments made to all suppliers and subcontractors.

b. Contractor and subcontractors shall maintain records for the longer period of (a.) six years from the date of final completion of the contract to which the records relate or (b.) until the conclusion of any audit, controversy or litigation arising out of or related to the contract.

c. Contractor and subcontractors shall make records available to Metro and its authorized representatives, including but not limited to the staff of any Metro department and the staff of the Metro Auditor, within the boundaries of the Metro region, at reasonable times and places regardless of whether litigation has been filed on any claims. If the records are not made available within the boundaries of Metro, the Contractor or subcontractor agrees to bear all of the costs for Metro employees, and any necessary consultants hired by Metro, including but not limited to the costs of travel, per diem sums, salary, and any other expenses that Metro incurs, in sending its employees or consultants to examine, audit, inspect, and copy those records. If the Contractor elects to have such records outside these boundaries, the costs paid by the Contractor to Metro for inspection, auditing, examining and copying those records shall not be recoverable costs in any legal proceeding.

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- d. Contractor and subcontractors authorize and permit Metro and its authorized representatives, including but not limited to the staff of any Metro department and the staff of the Metro Auditor, to inspect, examine, copy and audit the books and records of Contractor or subcontractor, including tax returns, financial statements, other financial documents and any documents that may be placed in escrow according to any contract requirements. Metro shall keep any such documents confidential to the extent permitted by Oregon law, subject to the provisions of section E.
- e. Contractor and subcontractors agree to disclose the records requested by Metro and agree to the admission of such records as evidence in any proceeding between Metro and the Contractor or subcontractor, including, but not limited to, a court proceeding, arbitration, mediation or other alternative dispute resolution process.
- f. Contractor and subcontractors agree that in the event such records disclose that Metro is owed any sum of money or establish that any portion of any claim made against Metro is not warranted, the Contractor or subcontractor shall pay all costs incurred by Metro in conducting the audit and inspection. Such costs may be withheld from any sum that is due or that becomes due from Metro.
- g. Failure of the Contractor or subcontractor to keep or disclose records as required by this document or any solicitation document may result in debarment as a bidder or proposer for future Metro contracts as provided in ORS 279B.130 and Metro Code Section 2.04.070(c), or may result in a finding that the Contractor or subcontractor is not a responsible bidder or proposer as provided in ORS 279B.110 and Metro Code Section 2.04.052.
7. Project Information. Contractor shall share all project information and fully cooperate with Metro, informing Metro of all aspects of the project including actual or potential problems or defects. Contractor shall abstain from releasing any information or project news without the prior and specific written approval of Metro.
8. Independent Contractor Status. Contractor shall be an independent contractor for all purposes and shall be entitled only to the compensation provided for in this Agreement. Under no circumstances shall Contractor be considered an employee of Metro. Contractor shall provide all tools or equipment necessary to carry out this Agreement, and shall exercise complete control in achieving the results specified in the Scope of Work. Contractor is solely responsible for its performance under this Agreement and the quality of its work; for obtaining and maintaining all licenses and certifications necessary to carry out this Agreement; for payment of any fees, taxes, royalties, or other expenses necessary to complete the work except as otherwise specified in the Scope of Work; and for meeting all other requirements of law in carrying out this Agreement. Contractor shall identify and certify tax status and identification number through execution of IRS form W-9 prior to submitting any request for payment to Metro.
9. Right to Withhold Payments. Metro shall have the right to withhold from payments due to Contractor such sums as necessary, in Metro's sole opinion, to protect Metro against any loss, damage, or claim which may result from Contractor's performance or failure to perform under this Agreement or the failure of Contractor to make proper payment to any suppliers or subcontractors.
10. State and Federal Law Constraints. Both parties shall comply with the public contracting provisions of ORS chapters 279A, 279B and 279C, and the recycling provisions of ORS 279B.025 to the extent those provisions apply to this Agreement. All such provisions required to be included in this Agreement are incorporated herein by reference. Contractor shall comply with all applicable



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requirements of federal and state civil rights and rehabilitation statutes, rules and regulations including those of the Americans with Disabilities Act.

11. Situs. The situs of this Agreement is Portland, Oregon. Any litigation over this agreement shall be governed by the laws of the State of Oregon and shall be conducted in the Circuit Court of the state of Oregon for Multnomah County, or, if jurisdiction is proper, in the U.S. District Court for the District of Oregon.

12. Assignment. This Agreement is binding on each party, its successors, assigns, and legal representatives and may not, under any circumstance, be assigned or transferred by either party.

13. Termination. This Agreement may be terminated by mutual consent of the parties. In addition, Metro may terminate this Agreement by giving Contractor seven days prior written notice of intent to terminate, without waiving any claims or remedies it may have against Contractor. Termination shall not excuse payment for expenses properly incurred prior to notice of termination, but neither party shall be liable for indirect or consequential damages arising from termination under this section.

14. No Waiver of Claims. The failure to enforce any provision of this Agreement shall not constitute a waiver by Metro of that or any other provision.

15. Modification. Notwithstanding and succeeding any and all prior agreement(s) or practice(s), this Agreement constitutes the entire Agreement between the parties, and may only be expressly modified in writing(s), signed by both parties.

\_\_\_\_\_  
By \_\_\_\_\_  
Title \_\_\_\_\_  
Date \_\_\_\_\_

METRO  
By \_\_\_\_\_  
Title \_\_\_\_\_  
Date \_\_\_\_\_