

BEFORE THE COUNCIL OF THE  
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF APPROVING AN ) RESOLUTION NO. 92-1599  
RFP FOR A NON-BUDGETED CONTRACT FOR) Introduced by the  
GROUP SALES SERVICES AT METRO ) Executive Officer  
WASHINGTON PARK ZOO )

WHEREAS, The Zoo has budgeted \$28,500 in fiscal year 92-93 for this contract; and

WHEREAS, This contract was not listed on the fiscal year 91-92 contract list; and

WHEREAS, There is a large financial gain expected if we start this contract earlier; and

WHEREAS, We have included \$4,750 in mid-year budget adjustments; now, therefore,

BE IT RESOLVED,

That the Metropolitan Service District Council hereby approves the release of an RFP for a group sales contract.

ADOPTED by the Council of the Metropolitan Service District  
this 23rd day of April, 1992.

  
\_\_\_\_\_  
Jim Gardner, Presiding Officer

grpsls.res  
March 17, 1992

# Request for Proposals for Group Sales for Metro Washington Park Zoo

## I. INTRODUCTION

Metro Washington Washington Park Zoo is requesting proposals for selling discounted group admissions and catered events to businesses, organizations, convention groups, meeting planners, tour operators and other groups. This would be a one-year contract renewable for an additional two years.

## II. BACKGROUND OF PROJECT

For several years, the zoo has been developing group sales business. We now have a banquet room, a full-time catering manager, award-winning group sales promotional materials and a great track record of satisfied clients. Much of the business to date has come by word-of-mouth. The zoo currently does \$325,000 in catering sales per year. Approximately 75% of this is in company picnics and other outdoor events, 15% is in Christmas parties and 10% is in company dinners and functions. More information on our ideal customers in an attached document. For next fiscal year, with the assistance of the contractor awarded this contract, we would like to to substantially increase our business in these areas. In addition, we would like to greatly increase our revenue in group ticket sales to convention groups, tour operators, social groups (such as church, youth and senior groups).

For these services, the zoo has estimated a budget of about \$28,000.

## III. PROPOSED SCOPE OF WORK:

The following tasks are to be undertaken by the contractor:

1. Prepare for review and approval by the zoo marketing manager goals for each of the following aspects of group businesses:

- company picnics
- Christmas parties
- receptions, meetings and other corporate and association events
- catering and block ticket sales to convention groups
- sales through meeting/event planners
- discounted tickets, meals and tours to youth, church, senior and other groups
- tour groups (through tour operators)
- other groups as appropriate

2. Develop and carry out strategies for generating prospects and bookings including

- developing and maintaining prospect and past client files (The zoo currently has a list of more than a 1000 prospects plus 600 past customers.)
- phone contacts
- personal visits
- tours of the facilities and familiarization events
- direct mailings (The zoo's marketing and design staffs will
- booths at trade shows and other events
- participation in group sales-related POVA and WCVA sponsored events and activities

the RFP or the project must be submitted in writing to Jane Hartline. Any questions which in the opinion of Metro warrant a written reply or RFP amendment will be furnished to all parties receiving a copy of this RFP. Metro will not respond to questions received after March 18, 1992.

D. 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. Metro reserves the right to accept or reject any or all proposals as the result of this request, to negotiate with all qualified sources, or to cancel all or part of this RFP.

E. Metro intends to award a personal services contract to the contractor selected for this project. A copy of the standard form contract which the contractor will be required to execute is attached (Attachment A).

F. 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. A monthly billing, accompanied by a progress report will be prepared for review and approval.

m

## **IX. EVALUATION OF PROPOSALS**

### **A. Evaluation Procedure**

Proposals that conform to the proposal instructions will be evaluated by a selection committee consisting of the zoo marketing manager, the zoo visitor services manager, the zoo catering manager and one person from the restaurant/hotel management field from outside the zoo. The committee will select finalists to make oral presentations.

### **B. Evaluation criteria**

This section provides a description of the criteria which will be used to evaluate proposals submitted to accomplish the work defined in the RFP.

1. Qualifications of individual or firm (20 points)
2. Previous experience (include references) (20 points)
3. Proposal (demonstrated ability to complete the scope of work) (40 points)
4. Fee (20 points)

3. Turn inquiries over to the catering staff when specific dates and events are ready to be booked,

#### IV. QUALIFICATIONS AND EXPERIENCE

The successful proposer will:

- possess a demonstrated ability to perform the services requested in the Scope of Work
- have experience in sales and the hospitality industry
- be an active member of the Oregon Society of Association Executives and Meeting Planners International and POVA
- be self motivated and able to work independently

#### V. PROJECT ADMINISTRATION

Jane Hartline, the Zoo Marketing Manager, is responsible for overseeing the contract.

The contractor and the zoo marketing manager will establish annual and quarterly goals for bookings.

The contractor will meet weekly with the zoo marketing manager and monthly with the with the visitor services manager and catering coordinator and marketing manager. At the weekly meetings, a detailed written report will be given to the zoo marketing manager, listing contacts made, status of potential bookings, etc. A quarterly report will summarize bookings for the quarter and progress toward the annual goals.

#### VI. PROPOSAL INSTRUCTIONS

A. Three copies of the proposal should be furnished to Metro Washington Park Zoo, 4001 SW Canyon Road, Portland, OR 97221, addressed to Jane Hartline. The proposal shall include:

1. A detailed description of how you would perform the duties in the scope of work.
2. Resumes of key persons who would be working on this contract.
3. Information about past work which would be similar in nature and ability to furnish recommendations of satisfied clients.

4. An hourly fee for your services, and how you would account for the time, plus a not-to-exceed estimate for reimbursable expenses such as mileage and photocopies.

B. Proposals will not be considered if received after 5 p.m., March 27. Postmarks are not acceptable.

C. This RFP represents the most definitive statement Metro will make concerning information upon which proposals are to be based. Any verbal information which is not contained in this RFP will not be considered by Metro in evaluating the proposals. All questions relating to

## *The Zoo's current group sales efforts*

*(It is our intent that the contractor would take over most of these functions. This list represents what we have been able to do with very limited time, so we assume that the contractors efforts will go far beyond these.)*

### *Catering sales*

- We have developed and are maintaining a list of 1000+ prospective and past clients
- We send direct mail brochures with tear-off return card twice per year to the above lists (one each annually for company picnics, holiday parties and general parties.)
- We have worked with the catering staff to develop theme parties and other special offerings
- We have worked with catering to set up booths at bridal shows and other events that may attract catered events

### *Convention sales*

- We send flyers with tear-off return cards to all convention leads from POVA and send out sales packets to groups returning the tear-off.
- We occasionally meet with hotel sales personnel to familiarize them with our unique opportunities for groups who want a night out of the hotel during their convention

### *Cultivation of sales to meeting/event planners*

- We maintain a list of meeting planners and plan a biennial party for them to show off our facilities, food and personnel

### *Discounted tickets, meals and tours for church, youth, senior and other groups*

- This year, we did a direct mailings to churches and selected other groups about our ZooLights event.
- We have met with the zoo Education and Visitor Services divisions about developing programming/meals for groups (camp-outs, special tours, etc.)

### *Tour operators*

- We have a list of and and maintain some personal contact with tour operators around the state and the most likely prospects from out of state
- We work with POVA and follow up on POVA leads to attract in-coming tour operators
- We participate in some POVA and other familiarization tours for tour operators

BID / RFP REVIEW FORM

Date Received by the Contracts Division 1/20/92

Check one)

BID \_\_\_\_\_

RFP  92R-3-20

Title of Project: Group sales for Metro Wash Park Zoo

Originator: Jane Hartline

Department/Division: 200

Carol  
Contact:

Reviewed by: Procurement Officer [Signature] (Please initial)  
[Signature] Date 1/10/92 A.M.H.

Construction Projects Mgr \_\_\_\_\_ Date \_\_\_\_\_

Legal Counsel [Signature] 3/11/92  
Date

Finance & Administration \_\_\_\_\_ Date \_\_\_\_\_

Insurance Coordinator \_\_\_\_\_ Date \_\_\_\_\_

Comments: Comments on RFP

Comments attached - Please advise re: Council action prior to year end

See data next pg. 1/10/92

Are contracts list or need resolution?  
Also need summary sheet

## REGIONAL FACILITIES COMMITTEE REPORT

---

RESOLUTION NO. 92-1599, AUTHORIZING RELEASE OF AN RFP FOR A NON-BUDGETED CONTRACT FOR GROUP SALES SERVICES AT METRO WASHINGTON PARK ZOO

Date: April 15, 1992

Presented by: Councilor McLain

**COMMITTEE RECOMMENDATION:** At its April 14, 1992 meeting the Regional Facilities Committee voted 4-0 to recommend Council adoption of Resolution No. 92-1599. Voting were Councilors McLain, Gronke, McFarland, and Washington. Councilor Collier was absent.

**COMMITTEE DISCUSSION/ISSUES:** Zoo Marketing Director Jane Hartline presented the staff report. She said the contract is in the FY 1992-93 budget but they would like to start it early. The Zoo has been doing catering for some years and has facilities for that operation. They have not marketed it to date, and expect that marketing of the catering program would produce additional revenues.

Councilor Gronke asked if the dates would be corrected, as he had with Resolution No. 92-1593, and Ms. Hartline said they would.

Councilor McLain asked for clarification on how the early start of the program would be budgetarily done. Ms. Hartline said the ordinance transferring Zoo appropriations from Contingency (No. 92-452) includes funds for the early start, some \$4,500.

Councilor Washington asked how much money this operation was projected to make. Ms. Hartline said the Zoo now does some \$325,000 in annual catering business, and they project that would increase by 35 - 40%.

Councilor Van Bergen asked if there would be any catering off the Zoo premises. Ms. Hartline said that generally there would be no catering off premises. In the past, they have done one or two events at the Forestry Center or OMSI for events that were at both the Zoo and the neighboring facility. Councilor Van Bergen asked if the Zoo has had any resistance from private caterers to the Zoo's expanding its business in this area. Ms. Hartline said that many prospective competitors were very interested in what they were doing. She cited hotel sales staffs who support the expanded Zoo operation because they sometimes have groups at their facilities that they can't completely accommodate, and they could suggest using the Zoo for an event. The Zoo doesn't have much competition for company picnics except Oaks Park, which they see as their friends and not competitors. Oaks Park is also a non-profit organization.

STAFF REPORT

CONSIDERATION OF RESOLUTION NO. 92-1599 FOR THE PURPOSE OF APPROVING AN RFP FOR A NON-BUDGETED CONTRACT FOR GROUP SALES SERVICES

---

**Date:** March 20, 1992

**Presented by:** Jane Hartline

FACTUAL BACKGROUND AND ANALYSIS

The zoo has budgeted \$28,500 in FY92-93 for the services of a person or firm to sell catered events and block tickets. This contract was not listed in the FY91-92 budget. However, because there is a large expected financial gain for the zoo if we start this contract earlier, we would like to do so, and have included \$4,750 in a mid-year budget adjustment to make this possible.

Currently our group sales efforts are limited to a small direct mail effort (two mailings per year) and promotion through meeting planners and POVA. Even with this minimal effort we project we will book at least \$300,000 worth of catered business for FY91-92.

With the intensive sales effort this contract will allow, we should be able to increase the amount of sales by a minimum of 27% for FY92-93. This would amount to an additional \$81,000 in the first year and we will expect significantly higher figure in future years. These additional enterprise revenues will help off-set the loss of tax revenues under Measure 5.

The contract scope of work involves such efforts a developing and maintaining lists of contacts, telephoning prospects, setting up appointments for personal visits and site tours, involvement with meeting planners, hotel sales staffs, POVA and other hospitality industry personnel, and helping strategize and produce direct mail campaigns.

**EXECUTIVE OFFICER'S RECOMMENDATION:**

Executive Officer recommends approval of Resolution No. 92-1599.



The attached personal services contract represents a standard document approved by Metro General Counsel. Any proposed changes in the language or construction of the document must be raised and resolved prior to and as a part of the proposal evaluation process. Award of contract constitutes acceptance of the standard contract terms and conditions. Therefore, Metro shall consider subsequent requests for material changes to the contract as a request to withdraw the original bid.

Contract No. \_\_\_\_\_

PERSONAL SERVICES AGREEMENT

THIS AGREEMENT dated this \_\_\_\_\_ day of \_\_\_\_\_ 19\_\_, is between the METROPOLITAN SERVICE DISTRICT, a municipal corporation, hereinafter referred to as "METRO," whose address is 2000 S.W. First Avenue, Portland, OR 97201-5398, and \_\_\_\_\_, hereinafter referred to as "CONTRACTOR," whose address is \_\_\_\_\_, for the period of \_\_\_\_\_, 19\_\_, through \_\_\_\_\_, 19\_\_, and for any extensions thereafter pursuant to written agreement of both parties.

W I T N E S S E T H :

WHEREAS, This Agreement is exclusively for Personal Services; NOW, THEREFORE, IT IS MUTUALLY AGREED AS FOLLOWS:

CONTRACTOR AGREES:

1. To perform the services and deliver to METRO the materials described in the Scope of Work attached hereto;
2. To provide all services and materials in a competent and professional manner in accordance with the Scope of Work;
3. All applicable provisions of ORS chapters 187 and 279, and all other terms and conditions necessary to be inserted into public contracts in the State of Oregon, are hereby incorporated as if such provision were a part of this Agreement, including but not limited to ORS 279.310 to 279.320.

Specifically, it is a condition of this contract that Contractor and all employers working under this this Agreement are subject employers that will comply with ORS 656.017 as required by 1989 Oregon Laws Chapter 684.

4. To maintain records relating to the Scope of work on a generally recognized accounting basis and to make said records available to METRO at mutually convenient times;

5. To indemnify and hold METRO, its agents and employees 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, with any patent infringement arising out of the use of CONTRACTOR'S designs or other materials by METRO and for any claims or disputes involving subcontractors;

6. To comply with any other "Contract Provisions" attached hereto as so labeled; and

7. CONTRACTOR shall be an independent contractor for all purposes, shall be entitled to no compensation other than the compensation provided for in the Agreement. CONTRACTOR hereby certifies that it is the direct responsibility employer as provided in ORS 656.407 or a contributing employer as provided in ORS 656.411.

In the event CONTRACTOR is to perform the services described in this Agreement without the assistance of others, CONTRACTOR hereby agrees to file a joint declaration with METRO to the effect that CONTRACTOR services are those of an independent contractor as provided under Chapter 864 Oregon Laws, 1979.

METRO AGREES:

1. To pay CONTRACTOR for services performed and materials delivered in the maximum sum of \_\_\_\_\_ AND \_\_\_\_/100THS (\$\_\_\_\_\_) DOLLARS and in the manner and at the time designated in the Scope of Work; and
2. To provide full information regarding its requirements for the Scope of Work.

BOTH PARTIES AGREE:

1. That METRO may terminate this Agreement upon giving CONTRACTOR five (5) days written notice without waiving any claims or remedies it may have against CONTRACTOR;
2. That, in the event of termination, METRO shall pay CONTRACTOR for services performed and materials delivered prior to the date of termination; but shall not be liable for indirect or consequential damages;

3. That, in the event of any litigation concerning this Agreement, the prevailing party shall be entitled to reasonable attorney's fees and court costs, including fees and costs on appeal to an appellate court;

4. That this Agreement is binding on each party, its successors, assigns, and legal representatives and may not, under any condition, be assigned or transferred by either party; and

5. That this Agreement may be amended only by the written agreement of both parties.

CONTRACTOR NAME

METROPOLITAN SERVICE DISTRICT

By: \_\_\_\_\_

By: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

APPROVED AS TO FORM:

By: \_\_\_\_\_

Date: \_\_\_\_\_

AMH:jp  
CONTRACT.FOR  
10/19/89

## Profile Ideal Catering Customer

### Time of year

#### First Priority

Our ideal booking months are June, July, and August. These are also the easiest to book, and should be first priority until maximum capacity is reached.

#### Second Priority

March (indoor only), April (indoor only), May (outdoor and indoor), September (outdoor and indoor).

#### Third Priority

November, December, January, February, October

### Size of Group

#### Indoor

##### Africa Plains Banquet Room

one group of 150 - 200	ideal
two groups of 100 each	ideal
group of 50	minimum
group of 210	maximum

##### Upper Level AfriCafe

150 - 180	ideal
50	minimum
200	maximum

##### Elephant Museum

50 - 75	ideal
50	minimum
80	maximum

#### Outdoor Picnics

Maximum capacity is 4 picnics per day, with up to 400 per picnic = 1600 or one picnic served in shifts up to 5,000.

### Maximum Capacity

#### Holiday Parties

Maximum capacity is three functions per day. Best dates for Christmas party bookings are Dec. 9 - 23. 15 days x 3 functions per day = 45 functions.

45 functions is maximum capacity for Holiday parties.

#### Picnics

3 picnic months (June, July, August), 14 potential weekends x 2 days per weekend = 28 functions. 28 large functions or 28 x 4 (small functions, 50 - 400) = 112 smaller functions.

### Type of Event

1st Priority	Picnics
2nd Priority	Sit-down Dinners
3rd Priority	Luncheons