

**AGENDA BILL**

**Beaverton City Council  
Beaverton, Oregon**

**SUBJECT:** Award Retainer Agreements for Professional Development – Project Management Training Services

**FOR AGENDA OF:** 3/20/18 **BILL NO:** 18065

**Mayor's Approval:** *Denny Dore*

**DEPARTMENT OF ORIGIN:** HR *M*

**DATE SUBMITTED:** 3/5/18

**CLEARANCES:** City Attorney *Grace Wong*  
CAO *HCT*  
Purchasing *J. Marshall*  
Finance *Pollock*

**PROCEEDING:** Consent Agenda (Contract Review Board)

- EXHIBITS:**
1. List of Proposals Received
  2. Excerpt from Solicitation #3303-18B Outlining Scope of Work.
  3. List of Consultants Recommended for Placement on Retainer Agreements

**BUDGET IMPACT**

EXPENDITURE	AMOUNT	APPROPRIATION
REQUIRED \$25,000	BUDGETED \$60,000*	REQUIRED \$0

\*Account Number: 001-15-0536-326 General Fund – Human Resources Department -- Citywide Training Account

**RECOMMENDED ACTION:**

City Council, acting as Contract Review Board, awards retainer agreement contracts for the initial two (2) year term, in a form approved by the City Attorney, to the consultants listed on attached Exhibit 3, and approves the authorization for City staff to extend the retainer agreements for three (3) additional one (1) year periods subject to Council's approval of future budgets from FY 2019-20 through FY 2022-23.

**HISTORICAL PERSPECTIVE:**

In September 2017, the Human Resources Department (HR) solicited proposals from qualified consultants to provide professional development training, facilitation, and organization development services to City employees. Services obtained under this process did not include project management training services. Around that time, one of the City's departments requested that HR obtain project management training services for selected City employees in that department. HR obtained those services through an informal procurement. Once employees from that department received project management training, however, HR received additional requests from other departments for this type of training.

As HR expects this type of training to be requested regularly by different City departments over the next five years, the expenditure for obtaining these services is likely to exceed \$100,000. Therefore, staff did a formal procurement process for these services that is in addition to the one completed in September 2017.

**INFORMATION FOR CONSIDERATION:**

The RFP was advertised in the Daily Journal of Commerce on January 31, 2018. Proposals were received by 2:00 p.m. on February 21, 2018. The RFP invited proposers to respond to all areas described in the Scope of Work. There were 71 firms that registered online to view and/or download the solicitation. Six companies from in-state and out-of-state responded to the RFP (Exhibit 1 attached).

The RFP specified that it is the City's intent to execute a retainer agreement with selected consultants who can support the development of the City's workforce in two competency areas (Exhibit 2 attached). It further specified that the retainer agreement will be in effect for a two (2) year period, with the option to renew up to three (3) additional one (1) year periods, for a total term not to exceed five (5) years.

A selection committee comprised of City staff reviewed and rated the proposals. All proposals were evaluated on the following factors: knowledge and qualifications (28 points possible), relevance of product or service (32 points possible), references provided and relevant experience (16 points possible), M/W/ESB Program (12 points possible), and fee schedule (12 points possible). The points awarded by selection committee members were averaged to arrive at an overall score for each proposer. The RFP stated that the proposers with the three highest scores are to be placed on a retainer agreement.

Staff recommends that Council award retainer agreement contracts to all of the consultants listed on Exhibit 2. Consultants selected and placed on retainer agreement will not be guaranteed a minimum level of work. After Council approves the consultant list, staff will work to execute project contracts for classes and/or services. Project contracts will identify the type of services, scope of work, fee, and terms of payment for services.

# EXHIBIT 1

City of Beaverton

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## PROPOSALS RECEIVED

**Professional Development - Project Management Training  
Services**

**Solicitation #3303-18B**

**Closed: February 21, 2018 @ 2:00 PM**

### Proposals Submitted:

1. Hunger For Success – Vancouver, WA
2. Synergy Professional Services – Portland, OR
3. Steaming Kettle Consulting – Portland, OR
4. Quality Management International, Inc. – Ashburn, VA
5. The Knowledge Academy – Bracknell, United Kingdom
6. Tigers Success Series, Inc. – Bend, OR

## EXHIBIT 2

### SECTION 2: SCOPE OF WORK

#### **2.1 Scope of Work**

The City is seeking sealed proposals from qualified consultants to provide professional development sessions, as needed, to cultivate leadership and provide for the developmental needs and professional growth of employees and work groups. The City is seeking consultants to deliver training, facilitate, project management sessions, and/or provide project management advisory services that support the competencies listed below. The competencies provide staff throughout the organization with a guide for continuous and measureable professional learning and growth that is focused on achieving organizational objectives and community goals.

The City anticipates selecting multiple consultants to place on Retainer to achieve a mix of project management classes that will support development of staff in varying levels of leadership in the following two competency areas:

1. Project Management
2. Portfolio Management and Strategy

#### **2.2 Services to be Provided**

For each workshop, class, or facilitated session within a Consultant's proposal, Consultant should identify how the training will further development in one or more competency areas. The number of classes offered in a fiscal year will be determined by the needs of the City, work groups, and individual employees. Classes may be held at one or more of the City's facilities. It should be assumed that most project management training, facilitation, and advisory services will take place at City Hall facility located at 12725 SW Millikan Way, Beaverton, OR 97005.

##### **2.2.1 Professional Development Services Competency Areas:**

- a. **Project Management:** Workshops, classes and/or facilitated sessions will focus on such topics as the foundations of project management and best practices, the phases of managing a project, techniques for project risk identification and planning, and other proven techniques researched by the Project Management Institute. Workshops, classes and/or facilitated sessions will also include visual tools for building a project management plan that addresses the how, when, and who of the project.
- b. **Portfolio Management and Strategy:** Workshops, classes and/or facilitated sessions will focus on such topics as the foundations of portfolio management and best practices, aligning projects and strategy, linking organizational strategy to execution, and managing integrated projects and programs.

### EXHIBIT 3

	<b>Proposer</b>	<b>Overall Score</b>
1	<b>Synergy Professional Services</b> Portland, Oregon	88
2	<b>Steaming Kettle Consulting</b> Portland, Oregon	84.75
3	<b>Tigers Success Series, Inc.</b> Bend, Oregon	83

