



## **GUIDE TO THE RFQ/RFP PROCESS**

For signage, wayfinding and environmental/experiential graphic design projects

### **OPTIONS FOR FINDING A CONSULTANT**

#### **Issue an RFP:**

When a project scope is well-defined the client can issue a Request for Proposal (RFP) to select a design consultant; in these cases the design firms will require certain information in order to formulate detailed scopes of work and accurate fees that are “apples to apples” with other firms. A listing of this information can be found on the RFQ/RFP template on the Cloud Gehshan website under “Resources.”

#### **Issue an RFQ with an RFP to follow:**

For projects where the scope is uncertain the client can issue a Request for Qualifications (RFQ) and design firms then submit requested information. Reviewing qualifications is an ideal way to educate the client group by showing them similar projects and explaining services that are available; it is then easier for the client to write an accurate scope description.

Once qualifications have been submitted the client has 2 options. (1) The client can select a design firm on the basis of credentials. After selecting the design firm the client and design firm can jointly determine the most sensible scope of work, keeping in mind client priorities, schedule and financial/staff resources. (2) The client can further define the scope of work and issue an RFP to select firms.

Reasons for evaluating qualifications before issuing an RFP:

The client’s RFP is often not specific or clear enough, making it likely that different design firms will assess the scope and level of effort differently, leading to wide disparity in fees and making “apples to apples” comparisons very difficult.

Clients are often doing this for the first time and don’t know how it differs from related activities such as architecture, resulting in an ineffective RFP.

### **THE PROCESS IN DETAIL**

- **Issue Request for Qualifications**  
Write the RFQ describing the project at hand and required consultant qualifications.  
Make any meetings optional unless you are limiting your search to local firms.  
Make yourself available to answer bidder questions (including phone availability).  
Transmit answers to all consultants via e-mail or make answers available on your web site.
- **Make final selection OR short list potential candidates**  
Review qualifications packages from candidates.  
If necessary, hold phone or in-person interviews, or request additional information.  
Make a final selection OR narrow down list of potential candidates to a maximum of 3 or 4.



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- **Issue Request for Proposals**

If working with a short list of candidates, decide what additional information you need to make a decision; this might include fees, approach to the project, process, etc. Determine if any changes to the scope or project parameters are needed. Prepare a Request for Proposal.

Note that if the project scope is well defined the candidates will be able to supply fee information. If project scope is not well defined it is not realistic to expect definitive fees that are “apples to apples” among all firms. As an alternative, the client may request hourly rates, general fee ranges for similar projects or fees for a specific segment of the work (such as the initial programming phase).

- **Answer questions**

Proposers will normally have questions, and should be given a deadline for asking them. As with the RFQ, all answers should be transmitted to all consultants (via e-mail or made available on a web site). Answers must be provided well before the proposal deadline.

- **Make final selection**

Review proposals from candidates.

If necessary, hold phone or in-person interviews, or request additional information.

Make a final selection.

- **Notify firms**

Notify all firms of the committee’s selection; if the final selection is contingent on successful contract negotiations, state that as well.

If the decision is delayed more than 2 weeks, let all design firms know what the revised schedule is. Design firms put a great deal of effort into preparing qualifications and proposals; the client should be willing to discuss the committee’s decision and “de-brief” candidates who did not win the project.

### GENERAL COMMENTS

#### Use of RFP’s and RFQ’s from other professions

RFQ’s designed for other types of projects (such as architectural ones) may be used as a guide, however the RFP should be written specifically for the environmental graphic design scope. The client should delete information or requests from its standard RFP/RFQ that are onerous or not pertinent. For example, if the RFP/RFQ document has been created for large architectural projects, it may request PERT charts, man hour commitments, liability, very high insurance limits, financial statements, etc, which are excessive or premature.

#### Administrative

RFP’s and RFQ’s are usually e-mailed or posted online. When possible, give a web address or e-mail contact where members can get the full rfp and any addenda.



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### **Client budgets**

If possible the clients should state their approximate budget in the RFQ or RFP (specifying fee and/or fabrication allotments). State how the budget was established (“the budget was established after consulting several peer institutions that recently completed similar programs”).

If the exact budget has not been determined, stating a general range would be appropriate. If the client anticipates phasing the project, that should be noted as well. State if the project is fully funded, or if there are outstanding decisions on grants, donor funds, etc.

Knowing the client’s budget helps design firms determine if the project is a good mutual fit. Many RFQ’s and RFP’s state the maximum fee dollars available; the designer can then work backwards and state what can be accomplished within the budget. The proposals will still be competitive, but based on amount of service.

Conversely, when the budget is not revealed, the client can conduct a lengthy national search only to find that the fees of most respondents far exceed budget limits. This is frustrating and time-consuming for all parties.

Another option is to state the expected fabrication budget; this can be helpful to the designer when evaluating the project or estimating the design fee. However it should be noted that design fees cannot be calculated on a percentage basis as architect’s fees are.

If necessary state that “the design and fabrication budgets have not been determined. It is expected that the consultant will assist the client in formulating a preliminary implementation budget during schematic design.” If this approach is taken, be aware that services and quality levels proposed will not necessarily be “apples to apples.”)

### **Selection criteria**

If there are evaluation criteria or scoring sheets, state the criteria that will be used. Client should state if they want local or regional replies only, or any other parameters. All these criteria are important for the consulting firms in deciding if the project is a good mutual “fit” and in preparing the proposal.

### **Information about competing firms**

Design firms may ask which firms have been asked to submit credentials. It is to the client’s benefit to make this information available; design firms are likely to be more competitive and make a greater effort to differentiate their services in relation to others. It is also reassuring to the designer to know that the client is including qualified design firms.

### **Timing of RFP’s and RFQ’s**

Client should allow 2- 3 weeks for preparation of qualifications and an additional 2-4 weeks for fee proposals. This is especially important for projects which are very large or where the design firm needs to assemble a team of consultants.