

[SAMPLE RFQ]

Used by client to identify design firms appropriate for a project.

**REQUEST FOR QUALIFICATIONS**

UNIVERSITY OF XXX [client name]  
CAMPUS SIGNAGE & WAYFINDING PROGRAM [project name]  
2/15/XX [date issued]

QUESTIONS DUE: 4 PM ON 2/22/XX

QUALIFICATIONS DUE: 4 PM ON 3/8/XX

NUMBER OF COPIES REQUIRED: (transmit electronically; no hard copies required)

.....

**CLIENT CONTACT:**

Jane Smith  
Title  
Address  
E-mail address  
Phone no.  
Web site

.....

**ADDRESS:**

Jane Smith  
Title  
E-mail address  
Street address for overnight shipping (if applicable)  
Phone number to be used on shipping label  
(+ any other shipping information)

.....

**REVIEW PROCESS:**

Proposers may e-mail or call with questions up until 2/22/XX (10 days before the due date). Answers to questions will be transmitted, within 48 hours, to all parties who have supplied their e-mail addresses to Jane Smith.

Qualifications will be reviewed the week of 3/11/XX. A short list of 3 firms will be identified by 3/15/XX. Short-listed firms will be asked to submit price proposals by 3/30/XX, and may also be asked for a phone or in-person interview. Final selection and notice-to-proceed is expected by mid-April.

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## PROJECT INFORMATION

### **General description of the client/facility/site**

(a short paragraph)

### **General description of the project**

(a short paragraph about the initiative and its purpose: why this is being done at this point in time? – e.g. visitors are complaining, new leadership, major new building, etc.)

### **Project documents**

*Relevant drawings and informational materials as available:*

Relevant site plan, area map or building plan

Renderings or photographs of the project

Drawings or photographs of current typical signs/graphic elements, if applicable

### **Project schedule**

(include any available schedule information; state all specific expectations)

### **Project scope**

(Describe the goals and general scope of the project.)

Example:

Design of [a new sign system] to serve the following audience(s): (drivers/pedestrians/cyclists; visitors, students, staff, retailers, residents).

The primary purpose of [the new sign system] is (to improve wayfinding, to define gateways, to build identity, etc.) for the following areas [interior/exterior, both new and existing areas]

Anticipated sign types are [directional, informational, regulatory, to be determined, etc.].

### **Services required**

(Is this a full-service project or just conceptual sketches? What does the client require?)

### **Qualifications required**

(Describe desired experience and qualifications of the consultant.)

### **Items not included in the scope**

(If known, describe related items that are not within the scope.) Example:

These items will not be included at this time: gateway ID signs, donor recognition, temporary signs, electronic signs, food service signage, retail signs, back-of-house items, signs for individual parking lots/spaces, parking garage signage and traffic (DOT) signs.

### **Other requirements**

(Add any other requirements or parameters, such as preferred location of consultant.)

### **Selection criteria**

State how consultant qualifications will be evaluated. Include the point system if one is being used.

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## QUALIFICATIONS FORMAT

WE REQUEST THAT THE CONSULTANT PROVIDE THE FOLLOWING CONTENT IN THE ORDER LISTED:

### **1 Company profile**

Provide a description of your company, capabilities and services. Describe your strengths and what you feel is unique about your qualifications.

### **2 Design approach**

So we can understand your approach to assignments like this one, further describe your design philosophy (or wayfinding philosophy; vary as appropriate).

### **3 Working process**

Describe the working process you typically use for jobs like this one.

### **4 Typical schedule**

Describe a typical timetable for similar projects you have done.

### **5 Project team**

Include resumes of the key members of the project team. Include resumes of any sub-consultants.

### **6 Hourly rates**

Provide a schedule of hourly rates for each staff position, and hourly rates for sub-consultants.

### **7 Credentials**

Describe [6-8] projects completed by your firm that you believe are most relevant, including photographs and a description of the projects.

[SAMPLE RFP]

Sent by client to a "short list" of design firms whose qualifications have entitled them to further consideration]

**REQUEST FOR PROPOSALS**

UNIVERSITY OF XXX [client name]  
CAMPUS SIGNAGE & WAYFINDING PROGRAM [project name]  
2/15/XX [date issued]

QUESTIONS DUE: 4 PM ON 2/22/XX

PROPOSALS DUE: 4 PM ON 3/8/XX

NUMBER OF COPIES REQUIRED: (transmit electronically; no hard copies required)

.....  
**CONTACT:**

Jane Smith  
Title  
Address  
E-mail address  
Phone no.  
Web site

.....  
**ADDRESS:**

Jane Smith  
Title  
E-mail address  
Street address for overnight shipping (if applicable)  
Phone number to be used on shipping label  
(+ any other shipping information)

.....  
**REVIEW PROCESS:**

Proposers may e-mail or call with questions up until March 25, 20XX (5 days before the due date). Answers to questions will be transmitted, within 24 hours, to all parties who have supplied their e-mail addresses or fax numbers to Jane Smith.

Proposals will be reviewed the week of 4/6XX. A short list of 3 firms will be identified by 4/13XX. Short-listed firms may also be asked to make an oral presentation the last week in April. Final selection and notice-to-proceed is expected by the 2nd week in May.

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## PROJECT INFORMATION

### **General description of the client/facility/site**

(a short paragraph)

### **General description of the project**

(a short paragraph about the initiative and its purpose: why this is being done at this point in time? – e.g. visitors are complaining, new leadership, major new building, etc.)

### **Project documents**

*Relevant drawings and informational materials as necessary to describe the assignment:*

Relevant site plan or area map

Building plans: key areas such as street level and typical upper floor

Plan of any other significant building(s) or space(s) that are included (e.g. parking structure)

Renderings or photographs of the project

Budget and schedule information

*Existing signage or environmental graphics:*

Drawings or photographs of typical signs/graphic elements currently in use, if applicable

Link to applicable branding guidelines or logo/logotype; provision of any existing sign standards

### **Project schedule**

(include any relevant schedule information; state all specific expectations)

### **Project budget**

(State the expected funding source(s) and whether the project is fully funded. Include any available fee or fabrication budget information; this helps the consultants understand both the size of the project and if the project is a good mutual fit.)

### **Project scope**

(Describe the scope as specifically as possible; if there is some uncertainty about project definition, state that or list the options being considered.)

*Extent of project:*

For exterior (site) projects how much of the site is included in the scope (front-of-house, back-of-house)?

For interior (building) projects how much of the building or complex is included?

(which floors, back of house areas, signs inside departments, etc.)

Is signage at the building entrances or on the building facade(s) included?

*Specialty items:*

Will you require specialty items such as: maps or diagrams, donor recognition, public art?

*Operational assistance:*

Will you require assistance with operational systems such as: staff training, IT, system management?)

Example:

We would like the following services:

Design of [a new sign system] to serve the following audience(s): (drivers/pedestrians/cyclists; visitors, students, staff, retailers, residents).

The primary purpose of [the new sign system] is (to improve wayfinding, to define gateways, to build identity, etc.) for the following areas [interior/exterior, both new and existing areas]

Anticipated sign types are [directional, informational, regulatory, to be determined, etc.].

**Services required**

(Is this a full-service project or just conceptual sketches? What does the client require?)

Process:

What do you expect the review and decision-making process to be?

What do you expect the information gathering process to be?

How many meetings or presentations will be required?)

Example:

We anticipate the following phases and number of meetings. All meetings will be on site.

Programming (1 meeting)

Schematic design and draft location plan/message schedule (1 meeting)

Design development and final location plan/message schedule (2 meetings)

Contract documents (no meetings)

Implementation supervision (1 meeting)

**Items not included in the scope**

(Describe related items that are not within the scope.) Example:

These items will not be included at this time: gateway ID signs, donor recognition, temporary signs, electronic signs, food service signage, retail signs, back-of-house items, signs for individual parking lots/spaces, parking garage signage and traffic (DOT) signs.

**Client-supplied materials**

(Describe what will and will not be provided to the consultant.) Example:

The client can provide the following items: accurate site plan in AutoCAD format, floor plans and elevations in PDF format and renderings of the project.

The following items are not available: design documentation or shop drawings of the existing signage and graphics.

**Involvement of client personnel**

(Describe the client team that the designer will be working with.) Example:

The client will have a project manager assigned to this project; it will be the project manager's job to schedule meetings and coordinate with stakeholders. The consultant will be working with a stakeholder group with client representatives from 8 different departments. The consultant will also be working with the architect and interior design firm hired for the project. One additional presentation to [the Board of Trustees][government officials][etc] will be necessary.

**Other requirements**

(Add any other requirements or parameters, such as preferred location of consultant.)

**Selection criteria**

State how consultant proposals will be evaluated. Include the point system if one is being used.

.....

PROPOSAL FORMAT

WE REQUEST THAT THE CONSULTANT PROVIDE THE FOLLOWING CONTENT IN THE ORDER LISTED:

**1 Project scope** [if the client has described a scope]  
Confirm your understanding of the project scope.

**2 Additional services**  
Describe any services not requested that you believe are necessary for the successful completion of this specific project.

**3 Project schedule**  
Please provide an approximate timetable for the work, based on a start date of XXX.

**4 Working process**  
Describe the specific working process you plan to use for this job. Confirm that the phases and meetings described in the RFQ are acceptable; if not, please clarify your plan for phases, meetings, and project activities.

**5 Fees and reimbursable expenses**  
Provide an estimate for your fees for the service(s) listed above. If an exact scope has not been defined, outline how you wish to be compensated. Also provide an estimate of reimbursable and travel expenses.

**6 References**  
Furnish 2-3 client references with phone numbers and e-mail addresses.

**7 Additional information** (optional)  
Based on an updated understanding of the project supply any additional information or credentials that would help in making a final selection.

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*Note: client should not say that proposal info becomes their property, since proposal development is an unpaid exercise. The client may opt to say that items designed under contract are their property.*