



Guidelines for clients issuing RFP's and RFQ's for signage & wayfinding projects

SUGGESTED PROCESS

Issue Request for Qualifications

Write the RFQ, using attached guidelines.

Make pre-bid meetings optional unless you are limiting your search to local firms.

Make yourself available during the bid period to answer bidder questions (including phone availability).

Transmit answers to all known bidders via fax or e-mail or make answers available on your web site.

Create a short list of potential candidates

Review qualifications packages from candidates.

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

Narrow down list of potential candidates to a maximum of 3 or 4.

Issue Request for Proposals

Decide what additional information you need to make a decision; this might include fees, approach to the project, etc. Determine if any changes to the scope or project parameters are needed. Prepare a Request for Proposal.

When requesting fees

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 (or accurate) fees that are "apples to apples."

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 or schematic concept phases).

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 their decision and explain why the candidate did not win the project.

REASON FOR EVALUATING QUALIFICATIONS BEFORE REQUESTING PROPOSALS:

- The client's RFP is often not specific or clear enough, making it difficult for the design firm to assess the scope, understand expectations and estimate the fees.
- 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.
- Qualifications are an ideal way to educate the client group about what services are available and what they should request.
- It is easier for the client to write an accurate scope description after viewing a variety of project examples.
- A proposal with customized information & pricing takes many hours of time to complete thoughtfully and is very difficult to prepare when the RFP is unclear.
- To make "apples to apples" comparisons possible



GENERAL COMMENTS

Client budgets

If possible the clients should state their approximate budget in the RFQ (specifying fee and/or implementation amounts). State how the budget was established (example: “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. that might delay the project

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 the 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.”

Use of existing RFP’s and RFQ’s

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, insurance information, financial statements, etc, which are excessive or premature.

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 firms.

Administrative

RFP’s and RFQ’s may be mailed, express mailed or e-mailed. When possible, give a web address or e-mail contact where members can get the full rfp. State where addenda or answers to bidder’s questions will be posted.

Timing of RFP’s and RFQ’s

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