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## **HOW TO WRITE A GREAT RFP**

### **PREFACE**

The following recommendation on How to Write a Great RFP is the result of many collaborative working sessions between Design Professionals, Construction Professionals, and Owners. For the purposes of this paper, the 'Author' is any person or entity who is creating and publishing the RFP. The Author can be an Owner, a Design Professional, or Contractor. As further noted below, RFPs should be Project Specific with the underlying objective of being an instrument to collect information that is important to the Author (aka Decision Maker) to perform a comprehensive evaluation. The author needs to be clear what the purpose of the Request For Proposal is and their goals and their business objectives for the proposed project and that these are effectively communicated to the people who will write the proposals. The information requested by the RFP should be measurable to enable an efficient, unbiased, informed decision to be made. As noted above, the following includes a listing of recommendations. Edit as appropriate for your respective needs.

### **REQUEST FOR QUALIFICATIONS (RFQ)**

It is not uncommon for an RFQ to be issued prior to the Request for Proposal (RFP) Phase of a project. All projects do not have a need for both an RFQ and RFP. If the Author does not have a need for soliciting additional information to determine and/or finalize the listing of firms that the RFP will be sent to, an RFQ is not necessary.

#### What is an RFQ?

An RFQ (Request For Qualifications) is a formal document asking for details about a firms' experience, previous project experience, and credentials.

#### What is an RFP?

An RFP (Request for Proposal) specifies a scope of work and/or services that are expected to be performed and solicits information from a potential partner describing how they would go about executing the project including pricing information.

\*Each project is unique, typically lasting more than a month with a collaborating team between the owner, Design Professionals and Construction Professionals. It is recommended that 7 to 10 firms are invited to participate in the RFQ Phase of a typical project. It is further recommended that a shortlisting occurs after RFQ responses are reviewed. It is recommended that 3 to 6 firms participate in the RFP Phase of a typical project.

### **SCOPE OF WORK / SERVICES**

It is recommended that the author of the RFQ and/or RFP identifies what services are being requested. More consistent RFQ/RFP responses can be developed when the author is specific with describing the expectations of the RFQ/RFP participants. It is suggested that the author includes any assumptions as may be necessary to further ensure consistent responses. For example, is the expectation that the design team performs a Feasibility Study? What are the design deliverables (i.e. Conceptual Design, Schematic Design, Design Development, GMP documents, 100% Construction Documents, As-Builts, etc.)? What is the expectation of the CM for any estimate deliverables? Similarly, it is equally important to list any exclusions such as Services and/or Work performed by others (e.g. Geotechnical Engineering Services, 3<sup>rd</sup> party testing and inspections, Furniture Fixtures & Equipment, LEED Consultant, Commissioning, etc.). Feel free to utilize the 'Additional Information' section to clarify expectations. The International Federation of Consulting Engineers (FIDIC) has many publications including the Yellow Book that can be utilized as a resource

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to better understand the Scope of Work, Services, and Project Delivery that may be appropriate for a project.

- Architectural Design
- Engineering Design
- Pre-Construction (Estimating, Scheduling, Constructability, etc.)
- Construction / General Contractor
- Construction Management as Constructor (CMc)
- Construction Management Agency
- Design-Build

Additional Information: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## **PROJECT DESCRIPTION**

### Overview

Provide a description of the project that includes a background that describes the reasoning for the project along with listing all parties involved including any 3<sup>rd</sup> Party Owner Representation. Include the project name and contact information. Define what you intend to design, build, and/or renovate and why. Clearly identify what you hope to accomplish with this project and what you see as success so everyone is aligned. Keep in mind that all entities should share a common goal and that you are potentially hiring the RFP participant to help realize your project goal(s).

### Project location

Provide the physical address of the project location and compliment with the following, if available.

- Site Plan
- Plans
- Sketches or Renderings
- Pictures

### Size

Discuss the size (e.g. number of stories, floors, SF, etc.) of the project and any special materials or features.

### Funding Requirements, if applicable

For example, is there Federal Funding? Are there any Grants? This information may result in items such as Certified Payrolls and specific procurement rules.

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Budget

It is helpful to communicate the overall Project Cost, Construction Cost, Design (Architectural & Engineering cost) and Owner FFE cost (if applicable). Sharing the project budget helps the participants develop and/or validate their fee(s) for the project. Sharing this information will help the author to perform an “apples to apples” evaluation between participants along with providing an opportunity for the respondents to provide budget feedback. Budget transparency helps to establish trust among the various members of the project team.

Project specific goals including but not limited to Diversity & Sustainability

The listing of project specific goals, even if unknown, helps to ensure comprehensive proposals are developed by the RFQ/RFP participants. Examples of diversity include MBE/WBE/DBE. Examples of sustainability include LEED, Well Being, and Passive House.

Schedule

At a minimum it is recommended that schedule milestone information (e.g. owner move-in, turnover, occupancy, go-live, etc.) is shared. Schedule related assumptions will likely need to be made. Schedule related assumptions such as the estimated duration for construction will allow an “apples” to “apples” evaluation of the proposals.

- Design Schedule
- Construction Schedule
- Phasing Constraints, if applicable

Additional Information

List any additional pertinent information including but not limited to the following:

- Major program alternates being considered
- Landlord and/or Property Manager
- Regulations (e.g. building rules and regulations, Special Conditions, etc.)
- Hazardous Material and approach to managing (Phase 1 and/or Phase 2 Assessments)
- Disclosure of any damages such as Liquidated and /or Consequential
- Funding Source for Project

**RFQ AND/OR RFP DELIVERABLE** (Items to Communicate in an RFQ and/or RFP)

- RFQ or RFP Issue Date
- RFQ or RFP due date and time
- Submission Requirement(s)
  - Hand Delivered
  - Electronic (encouraged)
- Pre-proposal conference
  - Virtual
  - In-person
  - Mandatory
  - Date
  - Time
  - Location
- “Estimated” Interview Date/Time
- “Estimated” Decision/Award Date/Time

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- Questions (Communicate protocol for questions including contact person, format, and cut-off date)

## SUBMISSION REQUIREMENT

### TECHNICAL

#### Firm Information

- Name of Firm
- Office Location(s)
  - Office that will handle this project
  - Number of people in this project office and total company by discipline
  - Year the firm was started
  - Size of firm (entire firm and/or project office) by annual volume of construction dollars that have been designed and put in place in the last 5 years
  - Brief history of firm
  - Software programs used for communication and drawing development
- Above information may also be utilized for primary consultants including but not limited to mechanical/electrical, structural, etc.

\* The author may also use a published Qualification Statement such as the AIA A305 Contractor's Qualification Statement, Standard Form 330 Architect-Engineering Qualifications, etc. to solicit the above-described firm information.

#### Relevant Experience and Reason Your Team Should be Considered

- Five (5) relevant projects in the last 10 years
  - Similar size, function, scope
  - Explanation of the services provided by the A/E firm
  - Size, date complete, functions, scope of services
  - Team (consultants and key personnel)
  - Pictures
  - Client references
  - Amount of new construction vs. renovation
  - Construction Delivery Method
  - Builder references
  - Designer references
  - Relevant Features of Projects
  - Brief overview of other relevant projects
- Statement as to reason your team should be considered. Items to be considered include proposed staff, insight, vision, core values, synergy with other members of the team (Owner, Contractor, etc.), culture, etc.

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Project Staffing (There is an opportunity to be Flexible with the Project Staffing Deliverable. For example, if Team Experience Exists, there may be more of a focus on a Corporate vs. Individual Resume.)

- Organization Chart with names of individuals for Architectural Firm and Consultants
- Resumes of key personnel (limit to 2 pages maximum)
  - Role on this project
  - Number of years' experience – total and with current firm
  - Reason this individual is proposed and how they will deliver value to the project
  - Availability of these individuals with respect to project schedule
  - Commitment from firm not to change personnel
- Relevant projects
  - Relevance to this project
  - Size, scope, date complete, other relevant information

Safety/EMR

Diversity

Sustainability

Experience with any specified unique funding requirements

\*It is recommended that the author communicates any desired constraints such as # of pages, font size, single page vs double page printing, file format or device for electronic submissions, etc.

## **FINANCIAL**

It is recommended to be clear as to expectation of fee (Percentage, Lump Sum, Not to Exceed, etc.) along with any breakout needs (e.g. Schematic Design, Design Development, Contract Documents, Bid/Permit Documents, Contract Administration, Construction, etc.). Also, be clear regarding any reimbursable expenses, if applicable. Publishing a form to be utilized by all participants is especially helpful for leveling purposes and provide information that is valuable during a scope review.

Some Possible Cost or Fee Information, not all will apply depending on the type of delivery system contract:

Design Fee \$ \_\_\_\_\_ Pre-Con Fee \$ \_\_\_\_\_

Stated Fee % \_\_\_\_\_ of the Cost of Work

General Conditions Staffing Costs \$ \_\_\_\_\_

Non-Staff General Conditions \$ \_\_\_\_\_

Insurance Rate(s) % \_\_\_\_\_

Bond Rate(s) % \_\_\_\_\_

Proposed Savings Participation Split (Owner / Contractor) % \_\_\_\_\_ / % \_\_\_\_\_

Billable Hourly Rates (Commonly submitted on a separate form)

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#### **EVALUATION CRITERIA FOR SELECTION**

Use this section to provide both a closing statement to the RFP along with being clear and direct in regard to what information the author is looking for and what will be the basis of award. Please be mindful that a lot of time and money is exhausted by participants when developing an RFP response. It is encouraged to communicate or share an evaluation scorecard, if a scorecard exists, that will be utilized level and score the RFP responses. It can be valuable for the RFP respondents to know and understand if an award will be more weighted on financials (i.e. fee) or qualifications. This section should be consistent with both the Project Objective(s) listed above and the Submission Requirements.

#### **DISCLAIMER(S)**

- Disclaimer for no selection or project not moving forward.
- Statement of Stipend for RFP submission (recommended) or Disclaimer that participants shall be responsible and bear the costs associated with participating in RFQ and/or RFP process.
- Late Submissions (Include a statement about late submissions shall not be accepted.