

## Writing a “Request for Proposals” (RFP)

Another request by our readers is for us to discuss what goes into writing a request for proposal (RFP). Similar to our discussion in this month’s *Facility Management* column discussing project management, RFP’s occur in all parts of the business community. RFP’s are also common in the residential community but with far less detail going into the RFP criteria. Not to be confused with RFB’s (requests for bid), which focuses strictly on procuring a price or prices for a specific scope of work such as an RFB from a general contractor or construction manager to construct a new building based on prepared construction bid documents that include a contract specification and detailed construction documents.

As a rule, RFP’s don’t occur until a program has been established and the scope of work documented. This program may be to build or renovate a facility such as a community center. Leading up to the creation of this building program a building committee will most likely be formed answering to building department, an industrial or institutional organization, etc. who are interested in investing in building a building or adding an addition or new structure to an existing site.

The building committee will be tasked to draft a preliminary outline often titled Owner’s Project Requirements (OPR) or titled Building Program for (*insert proposed project name*) that will take into account:

- Purpose for building: brief description of history and need for the project
- Project goals: Specific deliverables required for the success of the project
- Additional desirable goals: additional deliverables that should be considered but not at the expense of the required project goals
- Project constraints: specific constraints that must be accounted for in regards to the timing, the budget, physical location and/or site specific rules and regulations

Other considerations may be included in the OPR based on the building requirement e.g., to be located near a major highways, the facility be designed for Net-Zero Energy complex, etc.



With this preliminary OPR put-to-paper, this will be the time when the committee will draft an RFP to procure the services of a consultant i.e., architectural firm with or without engineering consultants to further develop the OPR for the client. That said, here are the highlights to writing an RFP:

**Introduction Letter:** This will be the cover sheet attached to the RFP being sent out by the committee to potential consulting services noting the information will be found in this RFP for the potential consultants to review, decide if their firm is interested and/or qualified to submit their proposal, and respond accordingly.

Leading up to the writing of the cover letter the committee will be tasked with developing a list of possible bidders for these consulting services. This list should be based on a preliminary investigation of potential consultants who are experienced in the designing of a project of this category e.g., community services building, gymnasium, factory, healthcare out-patient building etc.

This letter of introduction will need to list the name of the committee, project name, and the name of the committee member to contact with questions, along with this individual’s telephone number and/or email address. The introduction letter should also state when proposals are due, the method

of submitting, and the contact information of whom to submit to. Also, to be noted should be the expected date a proposal bid will be awarded to the appropriate bidder.

**Project Description:** This should be no more than a 2-page narrative addressing the OPR with its goals, additional goals, constraints, and other features worth noting from the OPR.

While as much information as possible could be noted within this project description it does not have to be so thorough because the committee is looking to hire the consultant firm to fulfill this task.

**Scope of Services to be Provided:** The scope of services should go into a detailed lists of responsibilities necessary to fulfill the role this company and its team would be performing.

Topics making up the scope of services may reference a system process, the steps or phases that should and a breakdown of activities within each phase.

**System or Process:** The process will most likely, depending on the OPR include a timeline in sync with the scope of services, as well as a preliminary list of “Deliverables” for each phase.

With most RFP’s, no matter the application e.g., designing a building, there should be an industry standard for the application, as well as a quality control process that the proposing company follows internal to firm. For a construction project there should be a suggestion for “project delivery” e.g., construction management, that would help define the consulting system/process.

**Fee with Assumptions and Reimbursements:** The cost structure of doing the work should be stated such as Fixed Fee, Percent of Total Project Cost, Cost of the Work Plus a Fee, Billed Time and Material, etc. Sometimes the proposers’ fee will be negotiated in two or more phases depending on the project e.g., existing condition survey at an agreed upon hourly rates followed by a Fixed Fee.

The company submitting their proposal may want to be reimbursed for additional expenses possibly including cost for reprographics, mileage to and from the job site, parking, etc. The RFP should specify if this is to be included in the fixed fee or reimbursed separately.

**Additional Services:** This is an important part of the fee agreement and should be noted for future discussion should the proposer be interviewed or selected for the project.

**Professional Qualifications:** The RFP should also request professional qualifications including references, relevant work

experience and a list of key team members. This information will be used by the committee to help evaluate the most qualified firm for the requested work.

The list should be past and current projects that are similar to the RFP project, employee size of the firm, diversity of in-house skills along with list of potential sub-consultants to fill the experience void rounding off the total design team. Also, a financial statement pertaining to the company stability should be included in the consultant’s letter of introduction.

**Professional References:** Here the proposer should provide a list of professional references that will be useful to the committee reviewing the proposals.

**Relevant Experience:** Continuing on with the project references should be a list of other projects that mirror the RFP project. This list should be able to reinforce the depth of experience for this OPR application.

**Introduction to the Team:** Here is where the company submitting their response to the RFP will list the individuals this company. This section of the proposal should highlight each person and their title for this RFP along with relative experience, years in the business, education, and certification, e.g., registered profession engineer, etc.

Request for Proposals should be a well-organized document touching on pertinent topics that will need to be addressed before a committee is ready to make a recommendation to the organization they represent. Also, prior to the committee make their recommendation for selection, there should be an interview period. At this point in time the committee will most likely have a reduced number of firms to interview each remaining proposal. The RFP will become the interview meeting agenda and further discussion will occur regarding some if not all the categories noted in the RFP. Once this is completed then the committee will probably be ready to make their recommendation.

For more information:  
[facilities@dioceseofcleveland.org](mailto:facilities@dioceseofcleveland.org)

