

Common Understanding

by Serena Furman



When I started working on this article, I was the exhibit designer at the National Heritage Museum in Lexington, MA. The intent was to take the formal and complicated RFP process and translate it for when smaller institutions are establishing new relationships with contractors. The contractors may be exhibit designers, fabricators, or design sub-consultants such as scenic fabricators or media producers.

Editor's note: *Serena's piece includes "quotes from the field" illustrating concerns from both the Museum Staff and Contractor's side of the RFP process. Since these quotes were gathered over several years time as the original RFP*

Cookbook *process waxed and waned, many of those quoted have changed positions (or even changed from staff to contractors, or vice-versa!) So, for the sake of clarity, attributions for the quotes below are omitted.*

Common Understanding: The Basis of the RFP

This article is for those that are seeking to improve their ability to put work out for bid. Few museums do competitive bidding on a regular basis. RFPs are needed for the rare project or expansion that comes along infrequently enough that the staff members that dealt with the last one are long gone.

The process often begins with adapting the sample RFP that has been obtained from another museum or crafting one from scratch. Sample RFPs can be very intimidating, with many pages that basically say "don't use bad lumber," or "clean up after yourself." The key is to understand what it is that the RFP is defining. RFP's come in many flavors, but they basically accomplish the same thing. The RFP's

purpose is to define the project and what each player is expected to do.

Preparing the RFP

What do you want? Who do you want? How do you want to do it?

Museum Staff: Be theoretical: what is your institution's mission, its educational goals, its staff organization, and what learning styles are you interested in using for this project. Then be specific: you have "x" number of artifacts, "x" number of hours of video tapes, "x" number of visual images to potentially use in the exhibit, etc. Or maybe you have nothing yet, and artifacts will be found and chosen along the way: they need to know this too.

Preparation is key to the successful exhibition. How well can the museum answer these three questions? While consideration of these questions is important, it is not necessarily good to have all the answers. Over preparation can be especially bad when answering the question, "What do you want?"

What do you want?

Museum Staff: What's often missing in the RFP is the vision that the institution wishes to convey with the project.

Institutions that have not worked extensively with contractors are the most likely to under prepare for a project. They often look to the contractor to help define the project and the process from the outset. Spending time beforehand defining and building internal consensus on what the goals of the exhibit are will yield significant cost savings for the project. Work on the very first step of defining what the

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institution wants to accomplish. Discussions should happen in many different formats to encourage input from a wide variety of participants both within and outside of the institution. The questions can go back and forth between listing the goals of the project and how these goals will best serve the various needs of the institution. It would be best to make clear to participants that the point of these exercises is not to come up with solutions to satisfy these needs. When this occurs, two things should happen. The ideas should be recorded and the discussion should be gently led back to what is trying to be accomplished, not how it is to be accomplished. This phase should occur after the exhibit designer is brought into the process. Facilitators can be found in the design and museum planning professions that can come in and facilitate discussions. Museums know when they can’t do this on their own.

Contractor: I would have agreed to do the project except I could see from the beginning that the client did not know what they were asking for and would take much more time than they had money to spend.

What do you want? Establish an outline of broad based objectives, not specific solutions. Talk about the collection you want to feature; the audience you want to reach; and how this exhibit serves your mission. Be prepared to tell the contractor any limitations that the institution needs to impose on the future costs of maintaining the exhibit. These broad based objectives are the best way to describe the project’s theme or purpose in the RFP.

Who do you want?

The search for contractors is best accomplished on an ongoing basis, rather than beginning

the search just before sending out the RFPs. Institutions should make it a point to be aware of the latest museum exhibitions and develop a list of who is doing the kind of work that interests them. Investigate projects both large and small as the right contractor may differ depending on the size of the project.

There are some key questions to keep in mind while reviewing exhibitions:

- Is the style and execution compatible to what the institution wants?
- Is there a good balance of form and content?
- How well does the form (media, exhibition casework, graphics, etc.) support the concept?
- Are resources used judiciously?
- What is innovative about the results?

Once a project is identified, the institution should be contacted immediately to get information. Don’t wait until your big project has arrived as this information is best harvested while still in the active memory of the institution. Questions about an exhibit done two years ago are too difficult to answer. Try to be specific and ask for the name of the firms and individuals that worked on specific exhibition components that you are interested in — media producers, scenic fabricators, graphic designers, whatever. Here also is an opportunity to ask reference questions about how well the project went in terms of creative process, budget, and deadlines. A short phone call is the best way to get this information. As institutions are usually short on time, it will probably be an imposition to request anything in writing.

Each contractor should then be contacted and asked to send information to be filed. Ask them to visit when they are in the area to show their

portfolio of work. Be sure to ask for the names of who actually did the work.

Museum Staff: I wish I had known about who would be my chief contact earlier. Often people seem to be substituted. You think you are paying for the principal in a firm and you get the third string. In some firms that is great, in others it is not!

There are two very important benefits gained from this research. An institution now has a clear notion of who they want to send RFPs to. They will know that they like the work of the contractor and that the firm works on projects of similar scope.

How do you want to do it?

The RFPs ability to be specific and to convey expectations will yield bids that are easier to compare. No two institutions develop projects in the same way. If you expect models, renderings, weekly meetings, then this should be clearly stated in the RFP. Here is where the exhibition is outlined so that contractors can make their bid based upon the time and resources that will be allotted to them.

Museum Staff: ...identify if you want the firm to design it, and then prepare documents so that you can competitively bid the project ("Design/Bid"), or do you want the firm to design, fabricate, and install the project ("Design/Build") all as one contract?...They [contractors] may need to know the total construction budget estimated for the entire project (for Design/Bid projects). This is because most design fees are determined as a percentage of the total construction budget: the more complex the project, the higher the percentage will be for the design firm.

A schedule for the project should be included in the RFP. The contractor needs to know how much time will be available to complete the project in order to create an accurate bid and coordinate demands of other clients. The RFP needs to reflect the museum's expectation of what needs to be done by both parties and when. These schedules should be maintained as a useful tool for planning further projects. For example, proofreading exhibition text may be estimated in the schedule as a five day period and take two weeks. Noting how time is actually spent can help forge better schedules in the future. The record will also help explain to others significant schedule and budget changes when they occur.

Contractor: I had a great project experience because the client was responsive and made decisions quickly and well. They understood the process of asking questions, but also the importance of answering questions! I know in exhibitions we talk about opening things up, getting people to ask questions both in the exhibition process and in the exhibition itself. But, there is also a time when there can be answers, when you arrive someplace definitive. I have had terrible experiences because a client could not commit and have had great experiences because a client had the ability to make informed choices.

Contractor: We learned a very painful lesson in the past when we took on a project with an unreasonably short schedule. It was also a government job. We had originally thought that the client would embrace our efforts to streamline the process in recognition of the highly compressed timeline. On the contrary, however, the client required more detail, more paperwork, and stricter adherence to

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artificial procedures (which had nothing to do to improve the quality of the work) than we had ever encountered before. Just because the government doesn't have adequate time to perform the work doesn't mean they don't care whether all the T's are crossed.

A list of project participants and their roles helps the contractor define the museum's responsibilities and the oversight process of the institution. It should define the core exhibition team and explain the review process that may involve others outside of the team. Museums may be short staffed and want curatorial and registrar-related tasks to be handled by the contractor. These might include writing, image research, and artifact installation. Authority and staff involvement should be agreed upon internally before bringing in outside contractors.

Contractor: I wish I had known about all the layers of people that felt they had to sign off on the project throughout the process... it is important for a client to refine this process to the best of their ability. Decision-makers must be involved at the beginning, or a delegated person with authority... otherwise second-guessing holds up the project, and more importantly it squashes a creative process.

Contractor: What makes a relationship work well is] team playing—I don't mean design by committee—I mean, like a baseball team. Everyone has to run, hit and catch, yet every person has their own position to play. You can be the outfielder and give all the advice to the first baseman that you want, but when you are playing the game, the first baseman plays first and the outfielder plays outfield, the manager is the manager, etc. Let each person do their job and support each other in doing it well.

Beyond the size of the space allotted to the project, institutions should list all amenities and access restrictions that the contractor will work with. Many an institution books functions in the building that may preclude working overtime. Some places open up their shops, and provide staff assistance when needed from the Facilities, Shipping, or Exhibit Preparation departments. Be clear as to what can be made available.

Museum: Exhibit fabrication firms will need to know what you will be able to provide them during installation, such as space to store tools, receive supplies, obtain additional electrical capacity during installation, and what about work site security? Are there other special requirements they will need to know about, such as union regulations, municipal codes, parking regulations, small freight elevators, or even dress codes that they need to account for? These factors will affect their enthusiasm, pricing and even their time line, so be a specific and thorough as possible: your surprises will cost you money.

Finally, remember that the RFP needs to look attractive. Museums should look at their RFP as something that is competing for the contractor's attention. Many institutions do not realize that some firms are choosing which projects to respond to within the current pool of proposals and the museum is actually competing for the contractor, not the other way around.

The proposal needs to be enthusiastic about the project and the document needs to demonstrate that the museum is experienced and relatively unencumbered by institutional mazes of administration.

The RFP should not, by its complexity, scare away the people you want. The written responses to RFPs for large projects cost the contractors thousands of dollars. An RFP that is far too complicated or far too simple for the project is a strong indicator to the contractor that the museum does not know what it is doing. For small projects, understand what the contractors are used to providing. It may be just an itemized bid. It might include a schedule. Who you want and what you want and how you want to do it are, in the end, defined by what you can afford.

Contractor: A realistic time frame to respond to an RFP is always helpful, and more importantly, it is great to hear that the proposal has been received along with a time frame of when a response will follow. This is helpful for planning purposes. ...[It] helps the contractor to make sure that they have the right staffing on hand to respond appropriately

The RFP Response

What are you going to do? How are you going to do it? When is it going to be done?

Museum Staff: I had a great project experience because the contractor listened and knew how to carry on a dialogue. He did not come into the project with preconceived design ideas set in stone.

Museum Staff: I had a great project experience because the designer met with the project staff and really learned what we wanted to do and bought into our established process.

The relationship of client to contractor is always driven by the basic assumption that the client defines the process and the outcomes of the project with the contractor's help. Whatever the museum has not defined in the RFP should be covered by the contractor. In the end, museums expect contractors to know what they are doing. Contractors need to know how the work is going to be done; how long it's going to take; and how much it's going to cost.

Museum Staff: I wish that the contractor understood the focus on interpretation and learning—not just design.

The underlying wish (or demand) of the museum is, "They better know what they are doing." Contractors that don't are not tolerated for long. Four manifestations of an unprepared Contractor are:

1. Charging the museum for time spent researching what the museum thinks the contractor already knows. This is a basic pitfall of contractors who are hired that may have general expertise in their field but have not worked with museums.
2. Creating unexplainable slippage in the schedule.
3. A poor success rate for final products.
4. Billing for additional costs after they are incurred.

There is no feeling that's worse than hiring someone and realizing that they know far less about the work that needs to be done than was expected.

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Museum Staff: When I didn't find out about different options in a timely manner, costs escalated and things weren't ready on time... unless we paid a premium.

Assume that the museum wants you to do everything and then ask questions to define the scope. When they say they will be supplying the content, what they may have meant is that they are writing exhibit copy and expect the contractor to conduct image research.

Be sure that the response to the RFP clearly defines the roles and responsibilities of all parties. Identify all subcontractors on your team and include their fees in your proposal.

The RFP response should have a section called Assumptions and a section called Added Services. The contractor uses Assumptions to clarify important details that affect the bid that were not in the RFP. Added Services list optional tasks that the contractor can provide that are not part of the bid. For example, your assumption may be that the museum will provide existing floor plans and your added service would be to do drawings of the existing conditions.

Museums and contractors can have different expectations of how the contractor's time is to be spent. Sometimes the institution handles construction supervision and installation. Certain details of the project can also be singled out by the museum as their responsibility. Museums need to see a description of how the contractor's time is to be spent. The contractor's labor estimate should be broken down into phases. For example, the phases of exhibit design could

be: Conceptualization; Design and Production Supervision; and Installation Supervision. Other commonly used phases are Master Plan, Schematic Design, Design Development, Contract Documentation, Bid and Negotiation, and Construction Administration.

Museum Staff: I wish the contractor realized that more expensive material is not necessarily better material.


Museums can have very different notions of how money is to be spent on production and materials. The contractor should explore the museum's exhibition history. What have been the budgets for previous exhibitions? Have they ever done a project similar to the one that is being proposed? An institution that regularly spends \$5,000 for an exhibition has a very different notion of how money is spent from an institution that regularly spends \$500,000. The museum may get upset if money is being spent differently than what is normal practice for the institution. Anxiety can build from something as small as too much reliance on overnight shipping. This may seem to be a small part of the budget, but to the museum it can be an indicator of questionable spending practices. The contractor should review the museum's production methods for previous exhibitions. The differences in spending practices between the contractor and the museum need to be defined. Discussing these differences in advance will greatly improve the ensuing relationship.

Bids can be obtained by issuing a lengthy RFP or simply by interviewing prospective contractors. The goal of developing mutual understanding is the same. Defining the process may not be the most exciting part of the project,

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but it will help to prevent misunderstandings, missed deadlines, blown budgets and other disappointments. Defining what lies ahead and the working relationship of the team that will get you there is the beginning of a beautiful project. ✨

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