Narrowing the Field

by Erich Zuern

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RFP RSVP

You have done the research by gathering RFP examples, gotten sign-off from everyone but the janitor at your institution and sent your RFP out into the world. This is your best project ever, right? So how can you make sure that the proposals that you receive are properly focused on your needs, and are limited to only those firms that are most qualified?

What's that? Your RFP should limit the number of proposals received? Yes! Limiting the responses to your RFP to those firms that are most qualified and best match your criteria is exactly the goal. The perfectly written RFP would result in exactly one proposal – from the perfectly matched firm. While that is clearly a fantasy, the more clearly and completely your needs, desires, requirements and prejudices are identified in your RFP, the more self-selecting firms will be, the more focused the proposals will be, and the less time you will have to spend weeding through proposals of lesser interest and quality.

I have read articles and participated in a number of sessions on successful RFP writing. Most seem to focus on clarity of purpose/scope (a good thing) and protecting the interests of the institution (also a good thing). I would like to propose that by taking the additional step of mentally walking in the shoes of potential responders and viewing the RFP document and process from their perspective, you will receive responses to your RFP that are fewer in number but superior in quality.

To propose or not to propose

As a for-profit firm engaged in the development and production of exhibits, you might think that to us all work is good work—that all work is to be eagerly sought after. After all, if we are for profit, then more projects equal more money equal more profit, so shouldn't we pursue every project available to us? Well, in a word, no. Not all projects are a good fit for all firms, and no one has unlimited resources with which to pursue projects. Responding thoughtfully to RFPs is an expensive process, a process for which there is usually no way to directly recover costs, so we all must make choices among the many RFPs that become available.

An appropriate analogy might be grant writing. It is impossible to write for every grant available because it takes time and effort (a LOT of time and effort in some cases). The time for grant writing is a limited resource so you pick those grants you are most likely to be awarded. This is also true with responding to RFPs.

So how is the choice made?

There are issues that are internal to a firm, such as alignment with our interests and abilities, current project commitments, staff availability and others, but I'll focus here on things that you as an RFP writer can influence. Like any business decision, we have to weigh where to apply the time and effort that it takes to create a quality response to an RFP for the best result. Here are some factors that you control as an RFP writer that affect our decision-making:

- How much effort went into preparing the RFP? This partly subjective, partly objective assessment is a judgment of how serious you are about the project and how you view and intend to relate to the firm you choose to partner with. For example:

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- Is the information clear and well organized? We are looking for the same things here that you are looking for in our proposal. Does it contain all of the information that I need, organized in a way that makes sense? There is usually an opportunity to ask clarifying questions, but if we have to work too hard to figure out the RFP, that often provides some indication of what the relationship will be like.
- Is it an RFP or a cattle call? Those of you in public institutions with a mandated process get a partial pass here, though I urge even you to find legitimate ways to narrow the field. For those of you with a choice in this matter, we do consider how many firms have been invited to submit proposals (or how many have registered to do so). If you have sent your project out to 25-50 firms (I've seen as many as 200), we have to seriously wonder how focused your project vision is. Numbers like this suggest that you view the relationship as a commodity rather than a partnership, which is not always conducive to a good relationship. If you can not escape an open call, I strongly recommend that you start with an RFQ (Request for Qualifications) process, from which you choose a select number of firms (4-6) to engage in the actual RFP process.

- Is the budget clearly defined or must we guess? I estimate that about half of the RFP's that we receive are straightforward about their budget. Essentially, the message sent by these RFPs is "Here is what we are trying to do, we have these resources (talent, time, money) to do it, and we are looking for the firm that can best help us accomplish this." Bravo! What puzzles me are the other RFPs. I assume that if you are at the RFP stage that you have established a budget, so why not share it? It is a critical component of your project, and of the RFP RSVP decision-making process.

By asking respondents to an RFP to propose a budget, you release a gigantic wild card into your RFP process, one that makes meaningful comparisons difficult for you, and meaningful comparisons are the whole point of the RFP process.

We received an RFP last month that looked like a really good fit for us—the subject matter, size and scope of the project were a good match, but there was no budget provided. We called to ask some questions, one of which was budget, which turned out to be less than half of the amount that we would recommend. We declined to submit a proposal. Think of the time and effort saved here. We, of course, saved the time of creating a proposal, but the museum also saved staff, board and volunteer time that would have been otherwise spent assessing a proposal (ours in this instance) that would have ultimately been rejected due to cost concerns.

- Is there a clearly defined RFP review process? We are much more comfortable responding to your RFP if you tell us clearly how and when you will arrive at a decision. Some RFP's go so far as to assign point values to different aspects of the response. Some are succinct (three categories), while others are more comprehensive (ten or more categories —some with sub categories) with point values assigned to all. I find this enormously helpful, since it tells me what you find important. Not only is the presence of review criteria a tool for deciding whether to propose or not,

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but how you weight the criteria tells us clearly what you are looking for. If our strengths match up well, we are more likely to write a proposal. This is a strong self-selection tool that saves time for both proposers and reviewers.

- Hidden Selection Criteria. In the interest of "being as fair as possible to everyone," or to "get the widest possible response," sometimes some selection criteria remain unstated. I'll ask that you look at these closely and deal with them explicitly in your RFP rather than have them surface later. Some examples:

  - We welcome all responses vs. we would rather work locally. If a project is located at some geographic distance from us, I will sometimes ask up front "do you have any issues working with a firm not located in your region." The answer is always no, with some variation of "we are looking for the right firm, wherever they are located." OK, fair enough. Further, I understand that sometimes the perfect fit is a firm that is close by. But when I subsequently hear that a project award was made "because we are more comfortable working close to home," I have to ask why that was not stated in the first place to save everyone writing and reviewing time. To use the grant analogy again: you find a grant that looks like a great fit to fund a project at your Chicago institution, you call and talk to the granting agency contact, do all of your research, spend a few weeks carefully writing the grant, double checking the details to make sure everything is covered and in the correct form - only to hear a few weeks after submittal that the granting agency has denied your application since it will only fund such projects in Miami. Surely you would find yourself asking "why didn't they say so?"

  - We just want the best overall fit vs. we want a firm that has produced exhibits for a… If you really want a firm that has already done six major aquariums, let us know that. If you prefer the cozy connection of a small firm or the robust resources of a larger firm, then let us know. If you prefer a team with a national reputation, or one with projects in your area, or with the energy of a start-up, or whatever it is that is important to you and your stakeholders, then let us know. The process and your project will benefit.

- Is there clear project information and background? An ideal proposal will communicate not just the facts of a firm's qualification and experience, but also an enthusiasm for your subject and your project. I want to be interested and excited about your project, and I want to communicate that to you. Obviously, to do that we need to know about your project. I have to say that most RFPs that I receive are good on this point, but it seems worth mentioning here an essential ingredient to receiving a good and thorough response.

- Is there adequate time to create a quality response? While many RFPs provide adequate time for response, I am occasionally astonished at how little time is provided. In some specific instances, I have known of a project for a year or more, the RFP will outline four to six weeks for review of the proposals, yet only two weeks are provided to

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actually write the proposal. This does a grave disservice to your project. Certainly all firms are on an equal footing, however in such a situation you are not receiving anyone's best work. As a very general rule, allow four weeks for a response, perhaps three if it is a very simple RFP, more if it is large and/or complex. Once you get down to only two weeks, firms will self-select by whose calendar happens to be free at the moment, not by who will be the best match for your project.

I recognize that writing a good RFP is a time-consuming process, sometimes completed in less than stellar circumstances. I am suggesting that by incorporating some of what I have outlined above into your RFP writing process, you will receive more focused and appropriate proposals from qualified firms and fewer proposals from firms that do not match your needs.

If you view the RFP writing not as a separate process, but as the beginning of a partnership —first a partnership in the RFP process and ultimately a partnership in your entire project —you will have a much more satisfactory end result.