

RFP Dictionary

by Lynne Friman

Lynne Friman is principal of Envisions Design, Ltd. She may be contacted at Lynnefriman@comcast.net.

As a designer I have responded to RFPs and written them for my clients. As staff member at several museums and as a consultant project manager for a variety of museums, including the Detroit Institute of Arts Reinstallation—I write RFPs. Thanks to Ben Kozak and Ted Swigon for mentoring me in the RFP Process; and Jim Notarianni for working with me on this article.

As a designer, I have answered RFPs. As museum staff and consultant, I have written RFPs. This is meant to be a practical outline so that you can write them as well. It is a culmination of various formats that I have cobbled together along the way. Each time I have to issue a new RFP, I look over the outline as though it is a checklist.

Then I fill-in or delete the appropriate sections.

Because an RFP is a portion of a legal document that is the first step in partnering with a firm, you may want to have your lawyer look it over and make sure that all sections are applicable to your locale or specific project.

1. Timeline for Bidding Fabrication Work- 3-5 months

Different sized exhibits require differing amounts of time for bidding, but this is a general guideline. Determine what your process is. Will you bid all fabrication components to one vendor (this costs more but saves time in coordination) or bid them as components to several firms (sometimes you can save money this way by paying specialists directly, but there is more coordination on the museum's side).

- RFQ (see below for process) _____ 1-3 months
- Producing the Bid documents-
 - Drawings from Designers, 6 months to 3 years
Begin design prior to the bidding process, unless you are doing a design build.
 - Producing the bid documents _____ 1 -2 months
(See "3. What to include in an RFP").
- Send RFP to bidders- Send express- next day delivery and track, to make sure it is received _____ 2 days
- Once the bidders have received the RFP...
 - Schedule a walkthrough- 3weeks after receipt of bid documents
 - Release any addendums to all bidders- the last addendum must be received by bidders at least 3 days prior to the due date of the Proposal
 - RFPs are submitted _____ 3-5 weeks
after sending RFP, depending on the complexity of response required
- Review of bids _____ 1-2 weeks
 - Review submitted bid documents
 - Clarify any questions with vendors by phone
 - If desired, meet face to face prior to bid award, so that bidder can articulate nuances of their bid.
- Award & draw-up contract _____ 1-2 weeks

2. Pre-Qualifying Bidders- Start with an RFQ (Request for Qualifications)

- Talk to colleagues that have completed similar projects; Meet potential vendors at conferences; Read trade magazines; Keep a running list of potential vendors.
- Send a letter to all potential bidders, which you believe could be right for your project. Tell them about your project and what you are looking for. Ask for their qualifications in advance of sending an RFP (resumes/vitae, company literature, web information, portfolio, references and other information). Find out their core competencies and make sure that they have the capacity to

complete your project, and what type of subs they might employ.

- Determine your process for review-
 - Is there a pre-qualifying team? Is this a group process? Or are just a few people making this decision?
 - Will you have pre-qualifying interviews?
 - Will you visit their workplace?
 - What is your criteria for selection- are their core competencies suited to what you are trying to develop?

3. What to include in an RFP- Table of Contents

Provide a copy of all of this information on disk to bidders, so the bidders can use the forms as digital spreadsheets.

I. Invitation to Bid (letter)

- A. Date
- B. Project Description
- C. Contact Information
- D. Signature

II. Instructions to Bidders

- A. Bid Process
- B. Walkthrough date
- C. Substitutions and Alternates
- D. Questions from Vendors
- E. Addendums
- F. Form & Style of Bids
- G. Number of copies of bids due
- H. Due Date for all bids
- I. Notification of withdrawal of bid
- J. Workforce and subcontractors
- K. Bid opening- public or private, on what date?
- L. Selection Criteria- Price, Capabilities, Financial Stability, Ability to meet schedule, Past Work, References
- M. Bid acceptance and Contract award, including date to be made on/ by or no sooner than

III. Scope of Work / Project Information

- A. Schedule of Work (including other spreadsheets and project information component information and written document about the components)
- B. Project Timeline/ timing of work
- C. Drawings- for construction, fabrication and graphic components include elevations, plans, sketches and details

This sidebar Q&A is based on a conversation between the author, Lynne Friman, and Jim Notariani of Exhibit Works.

Lynne Friman. How much time do you (or your firm) spend on RFPs?

Jim Notariani. We may spend up to 40 hours over a period of weeks on it. We very rarely have only one proposal to work on at a time.

LF. Who is involved?

JN. An estimator and project manager are directly involved. Sometimes an account coordinator is included. We have a person who puts proposals together, customizing boiler plate material along with the [specific] information a museum may ask. If it is a complete drawing package, every element is priced. When there is work that covers a lot of disciplines, the challenge is understanding what it is all about and then finding good partners to bring into the project.

(continued from page 81)

LF. Is a walkthrough helpful?

JN. Generally yes, particularly if it is new construction. Especially, to see what is there and get a sense of what is going where. It is also interesting to see who goes through the walkthrough, so that you know who will bid on the work [against you].

LF. Are there things that museums request that you wish they didn't ask or are irrelevant and waste your time?

JN. Sometimes museums ask for too much line iteming and they lose "the forest for the trees." Some state boilerplate makes no sense, you don't know why it is included.

IV. Bid Forms

- A. Bid Forms
 - a. Bid document
 - b. Pricing format (should be digital)
- B. Proposal Agreement

V. General Conditions

- A. Occupying and use of premises
- B. Coordination of Work
- C. Permits, Fees and Insurance
- D. Delivery Storage and Coordination
- E. Damage
- F. Defaults
- G. Guaranty/ Warranty
- H. Descriptive Materials
- I. Samples, submittals and prototypes
- J. Review of work in progress
- K. Installation
- L. Scope
- M. Qualifications
- N. Means and Methods
- O. Protections
- P. Cleaning
- Q. Project Manual

VI. Appendices

- A. Design Guidelines (if defined)
- B. Conservation Guidelines (if defined)
- C. Standardized bid questions (often required by government or corporations); If possible, try to demystify these forms for the bidders.
- D. Other pertinent information

4. RFP Dictionary:

While focusing on RFPs for fabrication, I am including some terms for other types of RFPs. These are largely from my experience with museums with artifact displays.

- Addenda—additions to the RFP, sent to all bidders at least 3 days prior to the due date.
- AIA—American Institute of Architects. They provide guidelines for bidding and contracts for

architectural & contracting processes. Some designers and fabricators have taken their cues from these documents.

- Alternates—deviations or changes from the included directions from the museum or designer. The museum should indicate if the bidder may suggest different methods or means, if they must bid indicated in the RFP, or both. Be clear if you want to empower bidders to suggest alternatives, which could save money, time or improve the final product. This may be further accomplished in a post bid meeting, prior to award of bids.
- Amendments—additions made after the contract is approved. These must be requested in writing by the museum and responded to by the contractor with cost, timing and variables. These must be approved by the museum prior to commencement of this work or the fabricator will be liable for these costs.
- Approvals—What is the process for approving materials, finishes, paints, laminates, glues, methods of fastening, graphics, samples, fabric application risers and prototypes. How many samples? Who is involved? Who signs? Who is on the email loop?
- As-built drawings—These are different from shop drawings. They note exactly how an item was built. It may cost more to get these included, but you will need them if you ever need to make changes, additions to your exhibit or use them as a basis for future exhibits.
- Award of Contract—selecting one or more bidders to work on your project, based on their bid, alternates and other selection criteria.
- Base bid—\$ amount for bid, as drawn, without any alternates.
- Bid Bond—This is done through the fabricator’s insurance company. It is generally free to the bidder.
- Bid Worksheet—This is filled out by the bidders. It should include all component groups (see component grouping) as line items, so that evaluation between bidders can be easily done.
- Bidders—The firms or people that the RFP is sent to. Depending on elements to be created, it may include architects, designers, writers, fabricators, producers of a/v and equipment, graphic producers, furnishings, lighting designers, lighting equipment, interactive designers and more.
- Built-in cases—a pocket is created in a wall. Usually the case is built offsite and slid into the pocket with a glass front or it may be built into the wall cavity on site.
- Component bidding—on the bid worksheet set up “like” units together, called component groupings. This may include, but is not limited to: fabrication, construction, text panels, photography, mounts. Some firms may indicate a discount, if awarded all component groupings.
- Conservation requirements—In order to keep your artifacts protected, your museum may require specific materials—such as low VOC paints, Dessiccants or chambers in the cases to keep the case interior at a relative humidity, testing of fabrics, much information on this is available at the National Park Service or the Smithsonian websites.
- Contract—What contract will be used to initiate the work? Does the museum have a format? Should the fabricator include their standard contract in their bid? Some contract elements may be deal breakers- be clear about these upfront. Make sure you make time to go through this before award of bid.
- Contractors/ bidders/ vendors are those answering the RFP. Each vendor has their own core

LF. How could we improve the RFP process?

JN. Museums should try to be as transparent to bidders as you can. Provide your budget. The museum seems to fear that they won't get their best deal if the bidders know how much they have. Then you level the playing field. This allows bidders to quantify how extreme the changes may be in order to get to the budget. Have your drawing package as complete as you can. If the bidder doesn't know a particular detail, then the bidder will assume the worst and price it that way. Museums don't ask enough about how the process will really work. What are the critical path issues in order to get work done? Allow as much time as possible for the process, so that you can negotiate the best deal with the right vendor. Real value is not just the price!

(continued from page 83)

LF. Should you pay a vendor to produce submit and RFP?

JN. Generally not. If you are asking for sketches, designs, reinterpretations- then you should be to a very short list.

LF. Are you paid for meetings, interviews or walkthroughs prior to award of RFP?

JN. Generally not.

competencies. Find out what they will do in their shop vs. what is jobbed out. Their partners are their Subcontractors(subs). The museum should be aware of who is working on their project and be able to reject a sub with cause. Subcontractors report to the contracted company and are paid through the contractor. The liability of the sub is through the contractor.

- Design—build RFP- have the firms respond with how they would meet your goals within time and budget, by both producing design and fabrication. When the budget is tight and no more can be spent, it may be prudent to state your budget.
- Invitation to bid—A letter to the bidders requesting their participation in the bid process.
- Materials—this is where you need to be specific. If there are conservation or aesthetic issues, mention what is approved or not.
- Off-gassing—allowing time for the finished items to sit and allow toxins to leach out, often prior to bringing cases into gallery. 10 days to 2 months may be required, based on materials.
- Open or closed bidding process—many public or government agencies require an open bidding process. In an open process, the opening of bids is a public reading of vendors and their overall bid. In a closed bidding process, generally at a private institution, the bids are opened behind closed doors. In either process, a tally of all components is kept and alternates are reviewed, before a selection is made.
- Pedestals—a stand with generally 5 or six sides that does not have a vitrine or is separate from its vitrine.
- Performance bond—The bidder pays this, if required, once they are selected for the project. It should be included as a line item on the bid worksheet and is usually a part of the cost of the bid, from 1% of the project cost.
- Pre-bid walkthrough—usually done 2-3 weeks after sending the bid. Before the bids are due, the museum provides a time for bidders to see site conditions, clarify language in the RFP documents and ask questions about the plans and intentions of museum. Generally all bidders come on the same date so that everyone hears the same information.
- Pre-qualifying—after the RFQ stage, determine who you will send your RFP to. Note on the RFP if this is an open RFP (anyone can apply) or a closed RFP (only those whom you have sent it to may apply)
- Prototypes—usually something of a 3 dimensional nature. What will these be used for? Approval of materials, methods and finish? Or testing with a potential audience? If used for testing they must be sturdy. These may include vitrine corners (to check seams and bubbles), finishes (especially for matching colors), a piece of the graphics to check for color, quality and weight. Interactive elements often need prototypes of parts or whole, to make sure that it works the way it was designed (see samples).
- RFP—Request for Proposals. Often sent to 3 or more vendors.
- RFQ—Request for Qualifications. See #2 above. “Pre-qualifying bidders”
- Riser/blocks—These may be made of a variety of woods, metal or acrylic. They are often painted or fabric wrapped. If fabric wrapped- will they be glued, stapled or tacked? Since artifacts or interactive elements may sit on these, the selection of materials are very important.
- Samples—What type of samples must be signed off on, before something goes into fabrication or

production. (also see prototypes)

- Schedule of work—usually a spreadsheet that denotes the work that must be performed and the variables for each component. There should be a separate schedule of work for showcases, paint colors, fabrics, graphics (which could be further subdivided into panels, labels, wall graphics, murals, photo panels and others)
- Scope of Work—What is included in this request
- Selection Criteria—By what criteria will the museum make their choice? Must the bid be the low bid? Are there other criteria that will be used, including approved alternates, proximity, process, or other opportunities and challenges that may come into play. Criteria for selection should be indicated on the bid document and may include the following- Price, Capabilities, Financial Stability, Ability to meet schedule, Past Work, References. Let the bidder know if one or two of these are weighted more than the rest.
- Shop drawings—Illustrate exactly how something is fabricated, down to the screws and glue. Vendors should supply this for approval prior to construction, fabrication or production.
- Showcase—a case which usually includes Plexiglas or glass enclosure to protect artifacts, props or other items in the exhibition
- The museum—For the purpose of this dictionary, it is the entity that contracts with the fabricator. Include names of the museum staff and those contracted by the museum to oversee the production process.
- Timeline—This indicates the timing of the production process, It should include a timeline, perhaps produced in Microsoft project, that notes key review and delivery dates.
- Vitrine—generally Plexiglas box with 5 sides if it sits on a pedestal or 4 sides, if it fits into a showcase with a back. ☀

In conclusion, Jim said "The bid process is really about communication. One of the things we forget when asking for someone to bid on this, you've been looking at this for months. The bidders have never seen it before. At some point it all comes together in their minds. So more time, more information will yield better results. That is a way to optimize [results]."



Why We No Longer Do RFPs

by Cliff Abrams

Cliff Abrams is principal of Abrams Associates Design, LLC. He may be contacted at cliff@aaexhibits.com.

Who did your bid drawings?

While ago we received what we thought was a reasonably straightforward RFP for design services for a small natural history museum in the Midwest. In addition to the usual boilerplate, it required the return of signed forms entitled “Non Collusion Affidavit” and “Business Relationship Affidavit”. Legal mumbo-jumbo aside, these forms are supposed to ensure that you (the vendor) won’t try to bribe them or that any previous business relationship you had in the past will *surely*, surely not affect the present business at hand.

We were getting ready to fill it out, include our samples and send it along when we noticed that you could also request a “Narrative Walkthrough”, “Schematic Graphics of the Gallery”, and “Contact Info”. Great. Any information is helpful, so we downloaded the materials. The few pages of the narrative were simple enough, and “Contact Info” was just that. However, the “Schematic Graphics of the Gallery” consisted of two very elaborate, full-color concept drawings of the space. Most interesting, though, was the fact that the name of the (very well-known) design office that had produced the drawings was still pasted in the corner of each of them—complete with the little © copyright device.

So we called the purchasing agent-in-charge. Again, in a remarkable display of candor (after a bit of embarrassed hemming and hawing), Mary (not her real name) did admit that, yes, it was a bit odd and that “others had asked about this”. I asked what she thought our next move should be since it was fairly apparent that they intended to re-hire their previous consultant, and why did they go through the motions of issuing the RFP in the first place. Mary then said that these

kinds of questions could only be answered by the director. He was out for a few days, but they would probably issue an addendum... or something... when he returned. We sent an email to confirm our discussion. Here is their response. Well... there was no response—at least not from the Director. However, they did issue an addendum with a reply of sorts: “Question [from a prospective vendor]: Will the design firm that created the schematic design drawings be bidding on the Design Development Phase? Answer: We do not know - they have been given the opportunity.” Yes. And I’ve got a bridge you may be interested in buying. This also happened in another New England state where the purchasing agent indicated that it was “very likely” that they would use the design firm “down the block”, but that their regulations required that they put the work out to bid every year. Again, admiring the candor, we are saving all these documents. They are available to any interested parties.

Didn’t you get the Addendum?

Today we unwrapped another RFP. This time from the State of Connecticut. In addition to a Mandatory Pre-Bid Meeting (gluttons for punishment that we are, we’ll be going—if only as a research project for this article), the 33-page document contains some of the most extravagant boilerplate legalese yet, including such gems as “Gift Certification”, “Campaign Contribution Certification”, “Certification By Agency Official or Employee Authorized to Execute Contracts” (a particular favorite, since the title is almost as long as the thing you’re supposed to sign), and “Consulting Agreement Affidavit”.

“...the purchasing agent indicated that it was “very likely” that they would use the design firm “down the block”, but that their regulations required that they put the work out to bid every year. “

In many RFPs there is a word or phrase that screams, “We’ve already selected someone”. It is usually under “Requirements”. Sure enough, there it was: “Related Experience: “... Demonstrated experience with intercollegiate athletic displays at other institutions of higher education is expected.” Is that narrow enough? As usual, we find this kind of chicanery particularly ironic since the State of Connecticut—and, to be fair, most offerors—go on and on about the absolute necessity of affirming vendors’ dedication to the concept and legalities of Affirmative Action and other similar bureaucratic folderol.

Apparently, all will be revealed at the “Mandatory Pre-Bid Meeting”.

Well, that was fun. We appeared at the appointed place and hour. It was a small, but nice, waiting area in a new university administration building. Conference room to the right, staff offices to the left. There was one other prospective vendor there when we arrived, and four others drifted in to wait to be ushered into the conference room at 10 a.m. Six prospective bidders altogether to attend the “Mandatory Pre-Bid Meeting”. Mandatory.

Ten o’clock came and went, as did 10.30 and 10.45. Finally, a university employee asked if we were “being helped”. This prompted a bright young bidder to say, “Well, no”. She then disappeared into the office space with the nice lady. She emerged a few minutes later to grab her copy of the RFP. (We could picture the scene in the office: “A meeting? What meeting”. Well, where’s the *bid number*.”). A few minutes later, another university employee (not the purchasing officer) came out to inform us that the meeting was cancelled, and we could all

leave. Which we all did.

When we returned to the office, there was an email waiting to inform us bidders that an addendum was issued—the night before. In the addendum was (oh, by the way) a note that the meeting was cancelled. What’s amusing about the whole thing is the image of the pre-selected contractor cooling his/her heels with the rest of us. Unless they were informed by the university ahead of time not to show up. Hmm. Not so amusing after all.

I kept slipping the deadline for this piece because these things just keep coming in. They are so wonderful in their awfulness that I want to wait to see how things turn out. For the above project, all the prospective bidders got a registered letter from the Purchasing Manager apologizing for “...the lack of timely communication distributed by...” They actually did “re-bid” this, but the (very extended) due date is a deadline-buster, so we’ll just have to wait on that one. It’s going to be really interesting, though, to see the reaction of their purchasing-agent-in-charge when all the poor suckers from the original go-round (and here we include ourselves) line up to re-submit.

By the book?

Another favorite is the blamed-for-their-lack-of-information RFP. We looked at one recently where they want a book written, edited (including photo research), designed, published, and marketed by one outfit. I don’t know who they have targeted to do this. I can’t think of anyone who could put that package together if they tried (Abrams [the other, richer one], Taschen?). We shared it with some organizations who may be able to meet most of those requirements, but they were