



Successfully Navigating



With the amount of school facilities that school districts require, districts are often busy building, renovating or repairing.

An important step to completing projects where an outside firm is needed is the Request for Proposal (RFP). The RFP brings structure to your decision-making process. Taking the time to put together a quality RFP on the front end gives clarity to the often challenging decision-making process. It also provides you a greater likeli-

hood of making the best choice.

All RFPs are not created equal. It is imperative that you create your own. Taking RFPs from other school districts can lead to problems down the road. We've received RFPs with old information that ended up costing both proposing firms and schools valuable time. While it's okay to borrow a friend's lawn mower, don't borrow their RFP.

It's also important that you understand everything that you're communicating in your RFP. If you do use a template, remove any references or statements that you don't

understand. Don't feel that you need to ask all 20 questions from a previous RFP when 10 will get you the answers and information you need. Consider which elements and questions are most relevant to your project.

Step 1: Planning

During the planning stage, you're gathering information about your vision while also pulling together insights about potential firms that will guide the process. As you

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the RFP Process

Investing time in the RFP
will make the whole process go smoother

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describe the project needs and goals, be clear about the services you are seeking. Determine your vision and project goals; state them in simple terms and in your own words.

Key aspects in this stage include:

- Identify the selection committee.
- Establish a timeline for your process.
- Determine your evaluation criteria.
- Prepare the RFP.
- Compile a list of firms to invite to respond.

Provide as much information about the upcoming project as possible within your RFP. If you are seeking multiple services, let the

firms know that you are open to receiving proposals for all services from the same company. Make sure to give the responding firms plenty of time to compile a comprehensive response to your requests. A month is typically considered very fair.

Be clear who the point of contact is regarding the RFP and if there is a deadline for asking questions. Districts sometimes want firms to go through just one person who represents a committee or board. Although this may keep it simple for the school district, also consider that it is sometimes helpful for firms to hear multiple opinions and viewpoints. When requesting RFPs, remember that firms' responses can be extensive and will require diligent review. Use various sources to find

appropriate firms, including advice from others who have completed similar projects.

Step 2:

Walk-Throughs and Tours

Most RFPs require a mandatory walk-through for all interested parties, but this can be a less than productive use of time for both district personnel and responding firms.

In lieu of a mandatory pre-proposal walk-through of your facilities, take another opportunity to help yourself evaluate firms. Make note of the firms that proactively contact you and ask to meet with you and tour your building and facilities.

Determine your vision and project goals ... state them in simple terms and in your own words.



Strong consideration should be given to using qualifications-based selection criteria.

If you have mandatory or voluntary tours, schedule them at least two weeks prior to due dates to allow the tour to inform the firms' preparation of the RFP. Tours provide attentive firms with the occasion to obtain firsthand information on the desired project and have pertinent concerns expressed. It will help demonstrate which firms are more invested in the project. If you do a group tour of all interested firms, it may avoid bias and save time while also providing the necessary insights to help teams prepare the best proposals.

Appoint just one representative to answer all questions after a tour to assure consistency and to avoid sharing conflicting information. It's also wise to distribute an FAQ document after the period of tours is complete. Many times, the questions expose key pieces of information that would have been helpful to have conveyed originally.

Step 3: Selection

Form a selection committee with a variety of individuals who have strong technical knowledge and experience in building design and

construction along with at least one board member. All selection committee members should have a good understanding of the RFP as well as the evaluation criteria.

Be certain to give committee members ample time to digest the submitted proposals, forming their own ideas and follow-up questions. Then, the selection committee can establish their shortlist for follow-up interviews.

Step 3: Evaluation

The criteria you establish for evaluation of the proposals must be appropriate for your needs and project. Strong consideration should be given to using qualifications-based selection criteria. Qualification selection will give you the best chance at working with a professional who will deliver a successful project. Some rely too heavily on cost being a determining factor. Cost does not equal value when selecting professional services.

Key items that you are likely to rate and evaluate include:

- Experience with similar or related projects.

- The skills and experience of key personnel.
- Analysis of project and level of interest.
- Design creativity and approach.
- Ability of the firm as it relates to quality of necessary support services.
- Relationship and connectivity.
- Capacity to manage project (costs, communication, schedule, etc.).

Step 5: Interviews

It is important to provide a uniform interview evaluation form that is well understood by the committee prior to conducting interviews. Interviewing the short-listed firms provides the committee with the chance to compare and contrast each firm's creative approach.

Be certain to communicate to the firms what the audio visual set-up will be so they can be adequately equipped to share their visuals. A large screen monitor, white board, or projector along with a computer are normal expectations for a presenting

firm. All firms should have advance notice of the criteria that will be used for evaluation.

Most interview teams choose to schedule all interviews on the same day, but they should at least be conducted in a short-time frame such as 36 hours. This allows the interview team, which should stay the same, to keep the information fresh and the scoring consistent. A period of 60 to 90 minutes should be ample time for the interviews as well as adequate time for your team to ask questions.

Resist the temptation to schedule the interviews back to back. While it may look like a good idea during scheduling, it doesn't allow time for the interview team to document their findings, engage in healthy discussion, or take a break. At the conclusion of the interview, in addition to expressing your genuine appreciation, share the timeline for selection

and method for communication of the results.

Step 6: Negotiation

As soon as feasible after a firm is designated, begin detailed discussions on a professional services agreement. This is the occasion to refine your objectives, project requirements, expected scope of services, and fees.

Up to this point, the firm was competing for your business, but now you should move toward becoming a team. Once the scope of services has been agreed upon, the firm will provide a detailed fee proposal.

In the instance that the selected firm and you cannot agree on the fees and scope of services, then negotiations with the next highest ranked firm should begin.

Your selected firm may recommend using a standard form of agreement developed by either *The American Institute of Architects (AIA)* or the *Engineers Joint Contract Document Committee (EJCDC)* to ensure widespread agreement. (These groups also have other forms and documents that you might find useful.)

Lessons Applied

Take the lessons that are shared here, the experience you and your team already have, and the insights from fellow superintendents or district administrators to leverage a great RFP process. Investing in the front end will reap dividends in a smoother and higher quality process. ■

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