

Writing Successful RFPs

by George Mayer

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RFP – Request for Proposal! Requesting proposals from qualified firms and answering proposals by qualified firms is the lifeblood of our industry. Our industry—exhibits—design, fabrication, media production, and the many other varied and unique specialties that go into making a complete exhibition.

But what about the RFP? What should it say? What should it **request**? Ultimately those questions can be most easily answered by asking yourself what you hope to get out of it. What kind of information should you ask for that is going to give you the answers you need to make informed, intelligent decisions about the firms that you'll hire to work on your project? After all, you're probably going to be working together for a couple of years. You might as well do your best from the start to determine who it is you'll be working with, what the working relationship will be like, and what the final outcome will be. There's a lot at stake, not the least of which is the ongoing interest and trust of your visitors, and maybe even your job.

Know Thyself

The best RFP's, the most successful RFP's are the ones that are written by institutions who know all of the facts about their project. What is the budget? What is the timeline? What is the anticipated attendance, etc? In the case of an exhibition that is to be installed in a new building, what are the completion and occupancy dates? As you can imagine, an RFP that is written "shot from the hip" is likely to get responses that are shot from the hip. This is potentially the beginning of a nightmare, for you (the RFP-er) and for the respondents.

Unclear information creates unrealistic expectations and confusing direction. Be on top of what you're asking for and, anticipate and have answers for every question that you will be asked during the RFP process. After you've picked a firm or firms to work with you, as deadlines loom and the pressure mounts to get the job done on time, all hell will break loose if a clear direction, grounded in a clear statement of expectations is not established from the start. The start, in this case, is the RFP.

Know Thy Contractors

Design firms, exhibit fabrication firms, and media producers all have varying levels of experience and expertise. They all have varying levels of staff, facilities, in-house specialties, labor rates, fees, overhead costs, and they all have varying degrees of good-will that they've built in the course of their work in the industry.

By knowing what your requirements are, you can more easily pick a list of firms whose experience and expertise most closely match the project you're about to do. You can easily make your list by first issuing a pre-RFP...a RFQ...a Request for Qualifications. Blanket the industry with an RFQ that will help you decide from a larger list of firms, which ones have the kind of experience and good references that most closely match your work, and then issue an RFP to a "short-list" of those firms whom you've selected from the much longer list. Under NO circumstance should you issue an RFP to a list of a thousand firms. Any firm will soon learn that they have 999 competitors and figure (rightly) that their chances of winning are slim. "Why invest the effort?" Even if they do respond, the responses you receive will likely be

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less informative than you'd hoped for.

In selecting your short-list, you should be selecting firms who are comparably sized, competitively equal, with the same level of staff, and the same level of experience. And remember, just because a firm has a large staff and a huge backlog of work doesn't insure that you're going to get what you want. Your \$500,000 to \$1million project may get less attention at a huge firm with a staff of 70 than it would at a smaller firm where the principals are involved with your project every day.

It does no one, (including yourself, because how are you going to do justice reviewing any of the proposals if you have 1,000 of them to review?) any good to receive proposals from firms who simply aren't capable just because you need to "fill up your dance card". It's not fair to the competing firms. Actually, it borders on being unethical. Unfortunately, it is not an uncommon practice for museums to solicit proposals from a very wide field of companies for the purposes of "seeing what comes back". Do your homework, know what you need to know, and be responsible in soliciting information from firms. You'll be respected for it, and the working relationship will be better for it. Do an RFQ first.

What Do I Need to Know?

Starting from an in-depth knowledge of what your project needs, your RFP should ask questions that will ultimately answer what firm(s) will most successfully fulfill those needs. But at the very least, you need to know:

- 1) The firms experience and how it matches your project.
- 2) A portfolio of the firms' work.
- 3) The firms' current workload and how it is likely to affect your project.
- 4) The key personnel who will be assigned to the project; their experience on other projects and length of time with the firm.
- 5) How the firm will accomplish the work. What is their work plan?
- 6) A schedule of key milestones and how those milestones match the schedule that's been established for the project.
- 7) The financial condition of the firm (no sense signing a contract with a company if they won't be in business half-way through the project). This information can be gotten from a company's current financial statement.
- 8) References. References. References...and not just the ones that are shown on the firm's reference list. Make some calls to the representatives at other projects from the project list.
- 9) Why does the firm want to work on this project? This is a question that is not often asked by prospective clients. Most clients assume that any project would be of interest, because it represents an opportunity for business. But if the firm you choose is only interested in winning new business and later finds that the project doesn't meet the projections that they made for its financial outcome, will they lose interest also represents an opportunity for our firm to bring our unique (design, fabrication, media, whatever) service to this very visible

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and interesting project” or “This project reminds me of my grandfather, because your project is about boatbuilding and he had a passion for building boats” Make sure that the answer you get indicates some interest aside from the passion about winning business. When the going gets tough, you’ll be able to call upon that passion to get better results. ✨

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***Really Fun Projects**

(You’ll need to read the articles in this issue to find out about those **other** RFPs.)