

addition, the team should prepare a list of criteria that are important to them in selecting a contractor. Consider such things as financial stability, years in business, reputation, on-time and on-budget completions, assigned staff, quality of work, references and satisfaction, and any requirements for union labor. Once the team has evaluated each long-listed firm, it can then narrow the number of possible contractors to a reasonable number. Consider market conditions and size of the job in determining the number of contractors. We suggest a minimum of three and maximum of six for the typical interior fit-out project.

### **RFP Preparation**

Request for Proposal (RFP) preparation is perhaps one of the most important items of the entire bidding process, and designers must follow a standard process with very little deviation if possible. The RFP will succeed only if the design team conscientiously prepares a form of request that is comprehensive and project specific. The form of request should include the following key elements:

1. ***Project Description.*** Briefly describe the project in terms of location and size. Include a general scope of the work to be performed by the contractor. Keep it simple. It is not very important to be very detailed here, just describe the essence of the work to be performed.
2. ***List of Drawings.*** The RFP should always incorporate a comprehensive list of drawings and their issue dates. It is important for the contractor to know that the set of drawings received is complete.
3. ***Bid Form.*** The RFP should include a bid response form. This form allows you to specify how you wish to receive the bid information back from the contractor. Typically, each trade is broken down into its constituent parts, with unit and or line-item costs for the project. The bid form is provided for the purpose of evaluating bids equally and to determine the appropriateness and completeness of each submission.
4. ***Terms and Definitions.*** Incorporate a list of definitions for terms used in the RFP, regardless of how rudimentary they may seem. Such a list leaves little room for interpretation.

5. **Scope of Services.** Provide a detailed scope of services indicating the responsibilities of the contractor.
6. **Project Schedule.** Indicate the project start date and any other critical project dates.
7. **General Provisions.** General provisions includes project guidelines for bid submission, requirement of site visits prior to bid submission, and contractor due diligence.
8. **Substitutions.** Provide a clear policy of how substitutions will be addressed.
9. **Insurance Requirements**
10. **Other Project Requirements.** Other requirements which should be considered as part of the RFP include an attachment of building, landlord, or property requirements, rules, and regulations.
11. **Other Attachments.** A particular project may require that the RFP include additional attachments. The standard form of contract between owner and contractor such as the AIA Document A101 or A107 should also be considered.
12. **Submission.** In the interest of competitiveness and discretion, sealed bids, delivered to the client at a time and place of mutual agreement, are essential. Submissions on municipal projects may require special procedures and they may also involve purchasing units or agents.

Again, the RFP preparation process will establish how contractors interpret project concerns, parameters, rules, guidelines, and form of contract. It is very important to follow a cohesive format and always provide parameters for submission.

The form of response as previously mentioned, is essential to the evaluation of bid responses. Typically, one of the most difficult tasks of the design professional during the bid phase is to evaluate what “is” and what “is not” included in the contractor’s submission. If your submission guidelines are clear and include the above structure, this process becomes quite simple. Figure 35-1 is the culmination of a well-prepared Request for Proposal.