



# **The Art of Drafting an RFP** **–Tailor your Contract to** **your Scope**

**Presented by:**


**Brenda Frank – Facilities Contracts**

**Chris Davenport – Project Management**



# Why Tailor the RFP to the Contract?

- ▶ By creating the project specific Contract up front, you are saving time in the process of creating the Contract during the CRP process in eBuilder.
- ▶ The Consultant buys in on the Contract they will be signing up front rather than at the end of the RFP process
  - ▶ If there are changes they can be made after the consultant selection and before the CRP process is started in eBuilder.
- ▶ This should provide all parties with a clear understanding of what the Contract entails therefore avoiding any issues after the Contract is executed.

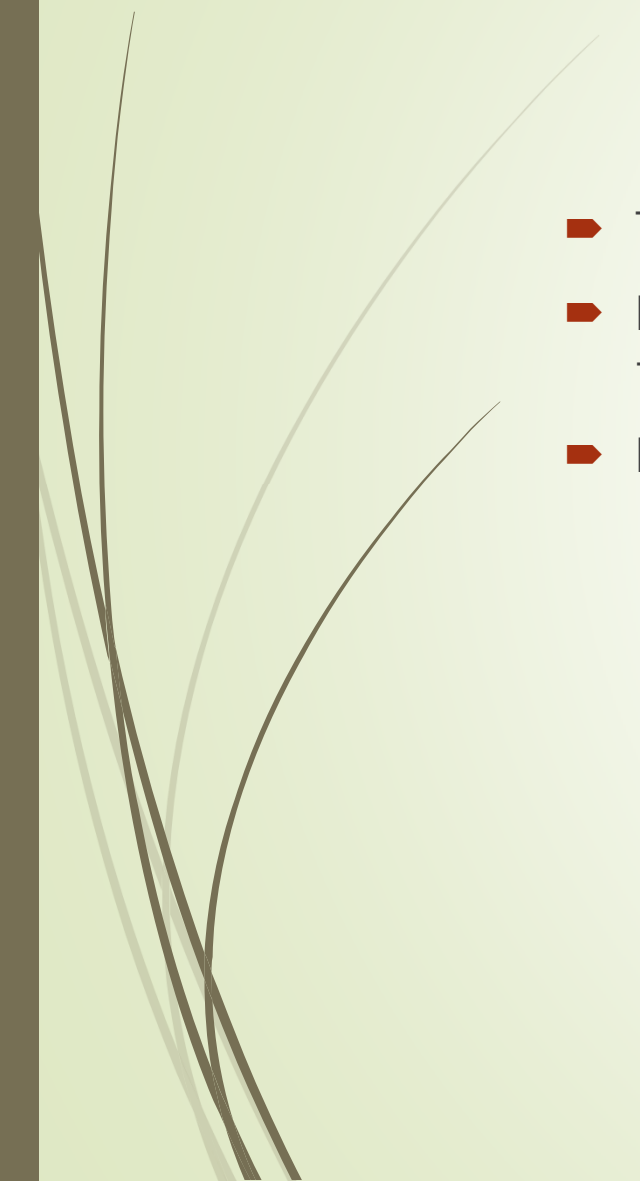


# Types of RFP's

- Studies, Testing, Commissioning and other miscellaneous items that are not design related
- Design
- We are currently updating and fine tuning templates:
  - RFP's will be uploaded to eBuilder Resources by February 1, 2019
  - We will be adding RFP templates for studies and one for miscellaneous items (e.g. testing)
- IDIQ's – Testing, Commissioning, Haz Mat, Small Design, etc.
  - There are templates in the eBuilder Resources along with guidance documents
  - This is the only RFP that can be sent out directly by the PM using the provided template
  - This will be processed as a TA not a Contract as we already have a Contract in place



# What is the purpose of the RFP?

- ▶ The Request for Proposal is a guideline / cover sheet for the Contract
  - ▶ It lets the Consultant know what we are looking for in the proposal from them and how we will be evaluating their proposals
  - ▶ It provides a quick reference for pertinent dates and other information
- 

# Components of a RFP

- ▶ **Introduction and Project Description:** A PM's way to present the project to the Consultant
  - ▶ This should be clear and concise: Info about the facility, brief description of the scope, any other pertinent information.
- ▶ **Scope of Services:**
  - ▶ Only list the phases of services, the description will be in the Contract
- ▶ **Schedule and Project Cost:**
  - ▶ If there is a walkthrough and/or interview date - note it in the beginning of this section
  - ▶ This section shall contain the deliverable schedule dates
    - ▶ State uses weeks, endowed uses dates
  - ▶ Include the Construction Budget Amount



# Components of a RFP

- ▶ **Detailed Response Requirements:**
  - ▶ Edit this section according to the project requirements
    - ▶ Scope, Approach & Methodology
    - ▶ Detailed and Itemized Pricing
    - ▶ Appendices
- ▶ **Requests for Information:**
  - ▶ This will now have a single source of contact – the Facilities Contracts mailbox
    - ▶ All emails will be forwarded to the PM and others as required
- ▶ **Selection Criteria:**
  - ▶ Edit this section according to the project requirements
- ▶ **Submission Requirements:**
  - ▶ Edit this section to include the date and time of the proposal due date
- ▶ **Attachments:**
  - ▶ List any documents you will be providing with the RFP
  - ▶ Provide the edited Fee Breakdown to reflect the phases of your project



# Types of Contracts

- ▶ Limited Services
  - ▶ For Studies, testing and any other professional service other than design
- ▶ Short Form
  - ▶ For projects under \$1M
  - ▶ Projects that may not require pre-schematic design, LEED, etc.
- ▶ Long Form
  - ▶ For projects over \$1M
  - ▶ Contains pre-schematic, BOD, LEED, Energy Modeling, etc.
  - ▶ Professional Liability insurance requirements are higher



# Limited Services Contracts

- ▶ The two basic elements are:
  - ▶ Scope of Work
    - ▶ Provide what you want the Consultant to do
  - ▶ Deliverables
    - ▶ List what you want from the Consultant
- ▶ The only item you will edit is Article II
  - ▶ The items in that should match what is in the RFP





# Short and Long Form Contract

- ▶ The major difference is the long form has BIM, LEED, BOD, etc.
- ▶ The items you need to edit are:
  - ▶ Brief project description
  - ▶ Article II – which is the Scope of Service
    - ▶ Delete what you are not using
    - ▶ A new contract is being developed for when you combine Schematic and Design Development.
  - ▶ Article III – only edit BIM, Permits and Approvals
  - ▶ Schedules at the end of the Contract:
    - ▶ Project Description (long form only) this will be the Introduction section from your RFP
    - ▶ DESIGN INTENT AND BASIS OF DESIGN DOCUMENTS (long form only) – Delete items that are not appropriate for your Project.
    - ▶ Project Schedule – dates should match RFP, do not add any items, delete a phase if not being used.
    - ▶ DOCUMENT SUBMITTAL REQUIREMENTS – Delete items that are not appropriate for your project.
    - ▶ OWNER BUILDING INFORMATION MODELING (BIM) REQUIREMENTS – delete if not used



# Hints and Tips

- ▶ Draft and understand your scope and the deliverables you want prior to starting the draft RFP
- ▶ Should have project schedule completed prior to drafting the RFP and Contract.
- ▶ Give yourself enough time – schedule the drafting of the RFP in your master schedule
- ▶ Include 1 week minimum for Facilities Contracts review prior to release date
- ▶ Use/imitate Contractual Language:
  - ▶ Avoid words like “might”, “endeavor”, etc.
  - ▶ No acronyms in a contract – e.g. MEP – mechanical, electrical and plumbing
  - ▶ Numbers should be spelled out – e.g. twenty (20)
- ▶ Formatting is important, if you have issues please see FC or Jessie for help
  - ▶ We have scheduled a Word Training on formatting for PM's on January 30<sup>th</sup>

# Questions

