

Processed Apples: One Museum's Recipe for the RFP Process

by Dan Bartlett

RFP means “Request for Proposals.” It should also mean “Rational, Formal Process.” Preparing and distributing an RFP, regardless of what it’s for, is a *process*—the actual bid document is only a part of that process and its preparation and distribution occur not at the beginning, but somewhere in the middle. The RFP process begins with planning, moves through the preparation and distribution of the actual RFP, continues with the evaluation of the completed bids, and ends in the selection of a vendor.

One of my first assignments after I came to Midway Village was to prepare the RFP for the master plan for a major new permanent exhibit. As I wrote the document, I tried to keep in mind what I thought would make the process easy and successful from both directions – from the standpoints of the institution paying for the project and the people trying to win the contract. In the end the rational, formal process we established helped us choose a well qualified designer who was able to provide exactly what we asked for at a good price. Was the process foolproof? No. There are things we’ll do differently in the future for similar projects and things we would change for different kinds of projects. There’s no single way to set the process up. What worked for us might not be the best for your museum or project. What follows is just one recipe for the cookbook. I hope it will give some guidance to those about to prepare RFP’s of their own. I hope too that it can help designers better respond to client’s needs and win more jobs.

What Kind of Apples do you Want?

The planning for our exhibit began several years before the work actually began. Midway Village’s long range planning process involved

discussions about what the exhibit might be like and how it would fit into the complete visitor experience. The result was that we were able to provide background details and specific desired outcomes in the RFP that we hoped would establish our credibility and readiness to move forward with the work. Research before we began also helped us jump right into the design process without having to get everyone on the same page first. We had visited several exhibits that we liked so we had a sense of the experience we wanted our visitors to have.

When it came time to actually draft the RFP, we started by looking around for examples of proposals and asked what vendors hope to see in them. We also looked for articles on-line that addressed the RFP process. This issue of the *Exhibitionist* should make finding such information easier. We at Midway Village had to rely on the kindness of strangers. Fortunately for us, exhibit designers, while strange, are also kind. We digested what we learned and drafted an eight-page RFP for the master plan. It went through three drafts before we felt that it said what we meant and all the details were included. I wrote the actual bid document with two things in mind. I wanted to be very specific about what we expected for our money and I wanted to be very specific about how the bids should be formatted and submitted. We wanted to be able to compare apples to apples.

Whose Apples are the Best for your Pie?

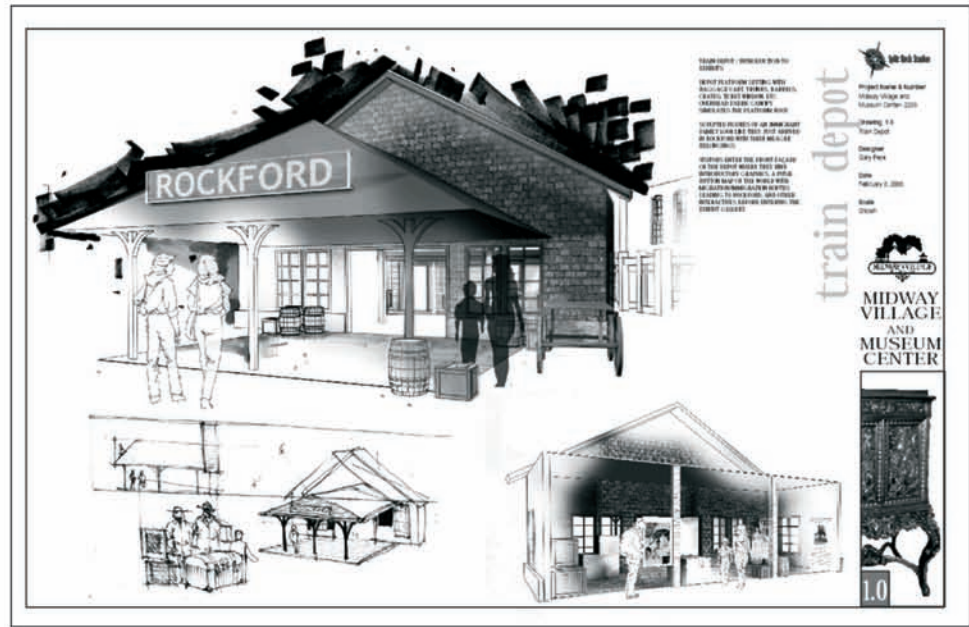
Our pool of potential candidates was created from the Association of Midwest Museums provider directory, from an internet search, from referrals from the Museum-L internet discussion list, or firms were included because they had done exhibits we liked. Designers

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needed to have experience in history exhibits and have completed projects in the Midwest. At least one firm was excluded because the flash animation on their web page took too long to load and I was unable to click through it. Another firm was excluded later for sending an unsolicited bid. We had inserted language at the beginning of the RFP to discourage unsolicited proposals. I thought it would have been clear to firms that got the RFP that they were not to pass it around, and to a designer that if he or she hadn't received it directly from us, they were not invited to send in a proposal. However, we did accept one proposal from a designer who was not on our original list of firms, but only because he had the courtesy to call and ask if he could compete for the work.

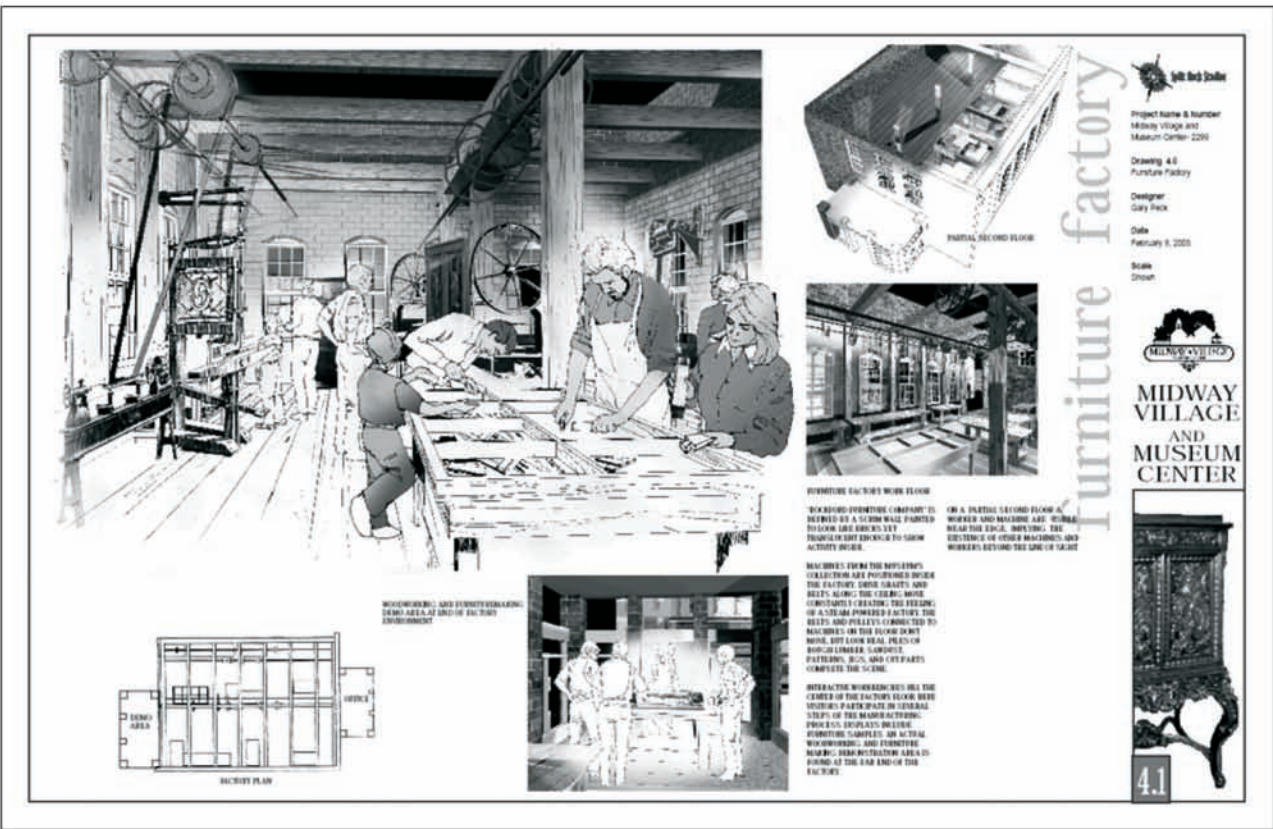
Ordering your Apples

While firms prepared their proposals, questions arose. Our system for handling these was that every individual question would be answered, but both the question and answer would be emailed to all of the participating firms. This goes back to the apples and apples comparison we wanted to be able to make when the proposals were completed. If everyone was preparing bids based on the same information, we hoped that the process of assessing them would be easier. In order to make sure that everyone was in the loop, we had a single point of contact for all communications throughout

the process. I was so designated, but at this point I was actually working in the shadows. Answers I drafted went out over Midway Village President David Byrnes' signature. As president, his word was the last word. If I had been the designated intermediary we were concerned that firms might go fishing for the answer they liked best between the two of us. Before the final submission date, three firms asked to make site visits and we accommodated them. I'm not sure any of the three gained an advantage in doing so – their proposals were not much different from the proposals of the firms that did not make visits – but one of the visiting firms did win the competition for the work.

Taking Delivery of Your Apples

We received twelve proposals. As mentioned above, one was tossed immediately. The remaining eleven were evaluated by myself, and our president, David Byrnes. We created a matrix that listed each requirement of the RFP: cost, time to complete, front end evaluation, experience with immersive and interactive exhibits, design philosophy, workload and how the proposal fit our submittal requirements. This helped us compare each proposal at a glance. The first round of cuts eliminated those firms that we felt had weaknesses in comparison to their peers in the specific required areas, or that simply did not follow the requirements for submittal. As much as the submittal



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requirements were created to make it easier for us to compare apples and apples, they were also a test. We felt that any firm that was unwilling or careless enough to submit a proposal that did not match our requirements for content or format might also be unwilling to work with us as a partner, or careless about the product they produced. Seven firms remained after the first cut. The second cut was more difficult as it was more subjective, but was still based on experience, philosophy and deliverables. The matrix made comparisons easy: apples to apples. At no point in the process did we eliminate anyone based on price. If that had been the most important criteria we could have ended the competition five minutes after we unsealed the bids.

David and I selected five firms to interview over three days. Finalists were notified by email and interview slots were filled on a first come first served basis. Our interview committee consisted of David and myself, our board president, and two members of the board executive committee. Each member brought

their own perspective to the interviews and each was allowed to ask questions. We made sure that everyone followed the same line of questioning in every interview, again to make sure we had apples to compare to other apples.

There was some discussion as to whether firms should be asked to bring design ideas about our particular project to the interviews. I was resistant to this idea and prevailed in the final decision. I felt it was unfair to expect those unfamiliar to Midway Village and our project to be able to bring design ideas for the exhibit to the table with no background and little time to prepare them. It would have been putting the cart before the horse and I was concerned that we would be locked into any ideas that might have been presented if they resonated with the committee – whether they worked for the exhibit in the end or not. As it was I'm not sure we didn't tie our designer's hands by specifying in the RFP specific areas we anticipated seeing in the exhibit. These had developed during the long range planning process before my arrival, and remain a good basis for the exhibit,

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but once we talked about them in the RFP we implied that we expected to see them in the finished master plan. And we did. I wonder if fresh, experienced eyes might have seen new and better possibilities for our exhibit if we had not limited their horizon before we even started. We could have left our specific ideas out of the RFP, yet still introduced them during the design process. Leaving them out would not have automatically deleted them from the exhibit. Putting them in the RFP automatically included them in the master plan, for better or worse.

Choosing the Apple of your Eye

It was interesting to finally meet the different firms during the interviews. Any one of the five was well qualified to do the work. I had been hoping some would fall flat to make the decision easier. That didn't happen. Each interview slot was two hours long and included a site tour. After the tour we listened to presentations, examined sample materials like those we expected to receive, asked questions and, as we had requested to meet with the persons at each firm that we would actually be completing our project, we gauged our ability to work with each team. Enthusiasm counted for a lot.

The firms that seemed genuinely excited about our museum and exhibit went the furthest. After each interview the committee members shared opinions.

After all the interviews were finished, the committee members each chose their favorite firm. There was very little disagreement and consensus was quickly reached. All that was left was to check references and these raised no red flags. We had a designer to help develop our new exhibit's master plan. We had created and completed a Rational, Formal Process that gave a level playing field to those firms competing for the work. It also made it possible to easily compare the proposals we received. We completed an involved process of selecting a designer, of which the actual RFP document was only a small part. ☀



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