



EarthRise design
 Interpretive planning + architecture
 Donald Watson, FAIA, CIP

Selecting professional consultants for master planning, interpretive planning, architecture and exhibit/facilities design services

The following guidelines represent recommendations based on EarthRise experience as advisor to public and private clients in selecting architects, exhibit designers and consultants. The guidelines are intended for small to medium-size organizations contemplating site master planning and interpretive design services. Larger projects normally require a more extensive process.

Professional firms offering architecture and engineering services must be licensed in the State where the project is located. Firms offering interpretative design services are not required to be licensed, but can be certified for professional qualifications by the National Association for Interpretation.

The process of selecting a professional firm—either for planning services only, or for planning and design services—requires the same general steps, which typically include:

- (1) prepare a scope of work and program statement including budget and schedule,
- (2) circulate or publish the intent to contract for planning and/or design services, specifying qualifications, interviewing and selection criteria, and
- (3) interview and selection of the firm most qualified to undertake the work.

RFQ / RFP formats for planning and facility design services

Most public entities, such as states and other governmental agencies, have a defined RFP public process for solicitation of consulting and services contracts, in which case the RFQ or RFP is announced officially through public notice, with the ensuing selection process defined to protect the public interests of fairness and absence of outside influence or favoritism. **An equally fair and “due diligence” process is recommended for any organization, private or public, in selecting professional consultants and firms.**

For substantial consulting assignments, organizations may choose to solicit submissions through a public Request for Qualifications (RFQ) or a Request for Proposals (RFP). An RFQ is appropriate for a project that is not well enough defined for a detailed cost proposal. An RFP is normally a legally binding representation for both the offeror and those submitting, that is, it asks for submission of a detailed work plan and costs for completing the work.

For small to medium sized projects, an organization can often determine the qualifications of individuals and firms by a short-form RFQ that asks specific questions. Asking specific questions helps the applicants in compiling their submissions and helps the reviewers by providing a similar format for evaluating submissions. Indicating a page limitation keeps responses to reasonable length, also helpful to reviewers and submitters alike.

Table 5 - Sample questions by which to formalize a Request for Qualifications (RFQ) or Request for Proposal (RFP) for Consulting Assignments.

Request for Qualifications (Short Form)	
(1)	Project Understanding. State your understanding of the assignment and how you would propose to organize the work. (1-2 pages)
(2)	Similar project examples. Provide documentation and/or examples of similar assignments and/or work products. [suggested limit to four to six similar work examples to avoid voluminous responses].
(3)	References. Provide the names and contact information (phone and e-mail) of at least five professional references, e.g., client representatives for the project examples. (1 page)
(4)	Additional information (optional) Provide other information that indicates your qualifications (degrees, certification, licenses, honors, recognition, evaluation reports that you use to evaluate your own work, other). (2 pages)
Additional questions appropriate for more detailed RFQ submissions or an RFP (cost proposal)	
(5)	Proposed Work Plan. Outline a project work plan of steps how you would propose to help us undertake and the assignment, including level of effort of subconsultants. (1-2 pages)
(6)	Proposed budget and fees. Indicate your proposed budget of fees and expenses. [Alternatively, you may elect to state the budget available for the consulting contract, and ask how the consultant would allocate that fee to accomplish the assignment]. (1 page).*
* [In a RFQ, this question is not normally asked and is subject to future discussion]	

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Additional tips on how best to evaluate professional qualifications

The following notes summarize recommendations and lessons learned from the selection process of architecture and interpretive planning and design firms.

- *Observe confidentiality.* Keep the selection committing meeting discussions confidential to avoid leaks and misunderstandings of the process. Keep the selection committee meeting discussions free of undue influence, so that the evaluation is through, even-handed and fair.
- *Avoid hearsay.* Make selection decisions based on the RFQ documentation submitted and on follow-up recommendations of references and others.
- *Practice fairness.* Be fair and above board to the professionals applying for the work. While protecting confidentiality of the discussion, let runner-up firms know something of the reasons they were not selected.
- *Check references of finalist firms* (contact at least three references for each finalist). You will receive generally positive reports from references and also learn about their different working styles.
- *Conduct an office interview.* As part of or prior to finalist selection, visit the offices and examples of projects of short listed firms, to meet their staff and understand their work process.
- *Define the finalist interview format.* Structure the finalist interview format so that you will meet those individuals who will be working with you.
- *Assess the design team's work style.* Ask the firm how they propose to work with you. Professionals should have an easily understood process with clear points for review, including budget control.
- *Check if and how the architects/exhibit designers have evaluated their own work.* Ask the firms how they evaluate their own work. Responses will vary, but should include some form of objective assessment by which a firm learns from its own prior work, including lessons learned.