

Sample Response to Request for Qualifications

Excerpted and adapted with permission from the University of California, Santa Barbara, Campus Sustainability Plan.
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SUMMARY

Provided here is one outline of information needed to respond to a request for qualifications (RFQ). Because every project and firm is unique, additional or different information may be required. This example from the University of California, Santa Barbara, although conclusive, is provided as an example only; it is not presented as the only format for responding to an RFQ.

QUALIFICATIONS FORMAT

Typically, owners ask that qualifications be sent in a wire-bound 8.5" x 11" format with project and firm identification on cover stock. The qualifications submitted must address the following major topics:

Approach. A general statement of the firm's approach with particular focus on distinguishing characteristics or services.

Work proposed to be performed. A discussion of the firm's general understanding of the scope of services to be provided and the major work tasks to be performed.

Project schedule. Include a Gantt or other graphic chart schedule indicating the anticipated duration and start and completion dates for tasks, keyed to the scope of work and integrating critical elements of the campus approval process. The schedule should also show consultant payments by percentage of total.

Key personnel. The proposal must include information about the firm's personnel, stating each person's proposed role in this project, education, title, related qualifications, past relevant experience, and the date that person joined the firm. The qualifications package shall specifically identify the personnel assigned. Submit a statement of qualifications, demonstrating experience and previous projects successfully completed.

Writing sample. Please include a minimum of one sample document prepared by or under the guidance the proposed project manager. This sample should be illustrative of the project

manager's writing skills and management capabilities.

Relevant experience. A statement of the firm's past appropriate experience, including a brief description of relevant projects and the client's name, address, and telephone number. Also provide a description of any consultant's exact responsibilities on each project, and clarify whether this project is an example of the firm's experience or of an individual's experience.

References. The owner requests the inclusion of three professional references in the proposal. This information should include the person's name, title, address, and telephone number.

Additional information. The firm may include any other information in the proposal that will assist the owner in the selection process.

Professional services agreement. Note any exceptions to the enclosed agreement that would prevent your firm from executing the agreement. We cannot accept any requests to include language to limit liability with regard to insurance and/or modify the indemnification clauses. Proposal submittals shall include a separate letter affirming the proposer's intent to accept the terms and conditions contained in the agreement.

Certificate of insurance. Note any exception to the certificate requirements and provisions that would prevent your firm from executing an agreement. Qualifications submittals shall include a separate letter affirming the intent of the proposer's acceptance of terms and conditions contained in the Certificate of Insurance.

RESOURCES

For More Information on This Topic

See also "How Clients Select Architects," *The Architect's Handbook of Professional Practice*, 14th edition, page 214 (published spring 2008). *The Handbook* can be ordered from the AIA Bookstore by calling 800-242-3837 (option 4) or by sending an e-mail to bookstore@aia.org.

More Best Practices

The following AIA Best Practices provide additional information related to this topic:

- 03.02.01 Sample Request for Proposals
- 05.02.01 Educating the Client
- 05.03.01 Qualifications-Based vs. Low-Bid Contractor Selection

Feedback

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Key Terms

- Practice
- Marketing
- Marketing plans
- Marketing materials
- Qualifications-based selection