

SAMPLE “REQUEST FOR PROPOSALS” TEMPLATE

Request for Proposals (RFP)

For: [Title of RFP Project]

Note: This sample is for a fabrication type of RFP.

[RFP ID #] Issued: [Date]

Submission deadline: [Time/Date]

Bidders Meeting: [Day/Date]

Deadline for final submission of questions: [Day/ Date/ Time]

Questions: Questions can be submitted prior to the Bidders Meeting on [Date]; however, no answers will be provided and/or circulated prior to that date.

ALL QUESTIONS PERTAINING TO THIS RFP MUST BE SUBMITTED BY [Day/Date/Time]

No interpretation of the meaning of the Bid Documents (drawings, specifications, et. al.) will be made to any bidder. Questions may be submitted, in written form, to:

[Contact details]

or emailed to _____ .

Questions will be answered by the appropriate individuals and answered within 2 business days via email with a return reply acknowledging receipt of the email requested. Questions and answers will be shared with all bidders.

Introduction

[Institution], (Owner) invites proposals for [RFP work description]. Based on previous work experience, your firm has been selected to receive this RFP and is invited to submit a proposal to produce the exhibition experiences described herein.

BIDDERS SHOULD NOTE THAT ANY AND ALL WORK INTENDED TO BE SUBCONTRACTED AS PART OF THE BID SUBMITTAL MUST BE ACCOMPANIED BY BACKGROUND MATERIALS AND REFERENCES FOR PROPOSED SUBCONTRACTOR(S) - - NO EXCEPTIONS.

Bidders Meeting

There will be an opportunity for prospective Bidders to meet with [Institution} staff for a Question and Answer session at [place] on [date].

Bidders Meeting details:

Date:

Time:

Location:

Participation at the Bidders Meeting is not mandatory, however, it is limited to two (2) people per firm. The purpose of this meeting is to give vendors the opportunity to ask [Institution] questions about the exhibition(s). If you are intending to send representatives to this meeting please send an RSVP to [Name], who can be reached at [contact info]. **Please provide us names and titles of those attending by [date].**

Each bidder will be responsible to provide detailed minutes and notes of the meeting within two (2) business days of the conclusion of the conference including detailed description of any changes made to the scope of work. These should be forwarded to [contact info] as Microsoft Word documents. [Institution] will then create a master meeting record that will be distributed to Bidders within the following two (2) days. The minutes will serve as the (only) official record of the items discussed and resolutions made during the meeting. All modifications noted in these minutes will be shared with all bidders

Exhibition(s) included in this RFP:

Please refer to the attached [Title of List] for the complete roster of exhibit experiences included in this RFP package. The experiences listed on this roster are part of the following exhibition(s) in development, slated to open [date]:

[List Exhibition(s)]

The scope of work for each of these exhibitions is detailed in the Proposed Scope of Work section of this RFP. To bid on an exhibit, the Contractor must complete all scopes of work listed therein.

[Optional:]

Bidders must bid on complete exhibitions. Bidders may bid on all of the exhibitions, or only select ones, but the bid(s) must incorporate all of the identified scopes for ALL of the exhibits described within each selected exhibition project.

Background

[Provide background on Institution and project(s) relevant to the RFP.]

Submission Procedure

Proposals conforming to the requirements set out below must be received by [Contact info] by US mail, courier or email [Contact info] no later than the deadline given above. All submittals must be received in PC - CD form along with hard copies. [X #] copies of each format are required. Text portions of the submittals are acceptable in Adobe Acrobat[®] form by the deadline (including via email) but must be followed in CD and hard copy form within two (2) business days. All electronic Bid Sheets must be submitted as Excel documents, not PDFs. Proposals must state that they are valid for a period of at least ninety (90) days from the closing deadline. Physical proposals must be submitted in sealed opaque containers and marked, [RFP title].

The name and address of the bidder must also appear on the envelope and CD cover.

[Institution] reserves the right to waive irregularities and to reject any or all bids. The Owner also reserves the right to negotiate with the selected bidder in the event that the price exceeds available funds.

[Institution] may consider informal any bid not prepared and/or not submitted in accordance with the provisions hereof and may waive any informalities or reject any and all bids. Any bid may be withdrawn prior to the above scheduled time for the opening of bids or authorized postponement thereof. Any bid received after the time and date specified shall not be considered. No bidder may withdraw a bid within sixty (60) days after the actual date of the opening thereof.

Modification of Bids

Modifications to bids already submitted will be allowed if submitted in writing prior to the time fixed in the Request for Proposals. Modifications shall be submitted as such and shall not reveal the total amount of either the original or revised bids.

Standards, Documentation and Training

The Contractor (Fabricator) is required to review [insert and Institutional design/fabrication standards documents that might be applicable]. Any deviation from these standards must be approved by [Institution].

[Optional:]

These standards and other RFP documents will be made available on the web. Bidders will be notified via email once the RFP website is established.

PROJECT DOCUMENTS:

The following accompany this RFP in [Disc] Format:

[Institution] [RFP Title]

[Institution] [RFP Title] Bid Sheets:

Each electronic project folder includes a tab for individual exhibits plus a Consolidated Bid Sheet listing all of the exhibits within [the/each] project.

[List Bid Sheet titles]

Exhibition Documentation: These files include [Exhibit Descriptions/Exhibit Drawings] for the exhibitions included in this RFP:

[List exhibition(s) and reference appropriate supporting docs]

Exhibition Project Overviews

[Institution] Sample Contract Template [date]

[Institution] Standards/Guidelines Documents: [List any applicable docs]

[Optional]

Accessing the Project Documents via the web.

The above documents will be made accessible via the web at:

[URL]

If you have difficulties accessing these documents please contact [contact info].

Opening, Evaluation and Contracting

Proposals may be opened by [Institution] at any time after the submission deadline. All proposals satisfying the requirements of this Request for Proposals will be evaluated to establish which of the offerors best fulfills the needs of [Institution] and this project. [Institution] anticipates entering into a contract with this/these offeror(s) to execute the proposed work. This Request for Proposals, however, does not commit [Institution] to award a contract, to pay any costs incurred in the preparation of a proposal or to contract for the goods and/or services offered. [Institution] reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with all qualified offerors or to cancel this Request for Proposals, if it is in the best interests of [Institution] to do so. The decision of [Institution] shall be final.

After the selection of a Contractor the schedule should include a period of collaboration between [Institution] and the Contractor to better define, elaborate upon and fix the Contractor's exact and final scope of Work (the "Final Scope") starting with the date of this Agreement and extending until [date]. In collaboration with [Institution], the Final Scope will be fixed no later than [date]. While the Contractor should assume work begins immediately upon notification that they have been selected, the Final Scope will be defined by editing, redlining or adding superseding documents or drawings to the Proposed Scope of Work as attached hereto. Once contracted, with respect to the Exhibit Documentation, Contractor warrants to Owner that the Scope of Work reflected therein can be completed by Contractor, in a form substantially similar to the preliminary scope, for the amount of the compensation set forth below.

Standards and Work Summary

Parts of this invitation's documents are [Institution]'s [list any applicable standards documents and/or official guidelines included in the RFP]. [Institution] expects to enter into a contract using these standards, especially those sections establishing warranties, guarantees and [Institution]'s rights to intellectual property.

Form of Contract

Enclosed with this Request for Proposal is a sample copy of [Institution]'s typical form of contract. [Institution] expects to enter into contract with the successful bidder on the basis of this form of contract.

The submission of a proposal implies an acceptance of determining final scope amounts and general acceptance on the part of the bidder of the terms of this form of contract, and especially of those parts establishing warranties, guarantees and [Institution]'s rights to intellectual property. In addition, all aspects of the proposed work must comply with [Institution's] [Standards doc(s)] and [Institution]'s Liquidated Damages policy (reference below).

Owner's Liquidated Damages.

[Insert Institution's Liquidated Damages requirements.]

Project Completion

The Project is to be completed on or before [date].

Proposal Contents

Proposals, together with letters of transmittal, should include the bidder's description of the work that would be performed and the following information:

- For each exhibit describe the level work of work to be performed.
- The team of people who would execute the work, with descriptions of the experiences and skills of each and his/her role in the bidder's firm and in the team.
- Names, addresses and descriptions of key subcontractors which your firm would employ and a description of their relevant experience and past performance.

Any subcontractors must be identified in the bid. [Institution] must know if work is being done outside of the firm. Please see the contract on details of subcontractors. Please remember that after contract signing [Institution] reserves the right to approve all subcontractors that were not approved during the RFP process. Denial of a subcontractor by [Institution] will NOT absolve the bidder from getting the work done for the contracted price.

- The name of the person in your firm who would be the official contact person for any contractual relationship.
- At least two comparable previous projects in which the bidder has engaged, with names and telephone numbers of contacts with whom the bidder's previous performance can be discussed.
- Examples from past projects that reflect the deliverables and scope that are listed in the scope of work.
- A management plan for the work.
- A schedule for the work, including the range of start dates to which your firm is prepared to commit and anticipated completion dates. This schedule should work within the timeframes outlined by [Institution]. Any conflict in the two should be described. The schedule should include a list of all anticipated meetings with [Institution] and their locations.
- Proof of insurance and bonding.
- Completed Bid Sheets.
- Written description and explanation of the completed Bid Sheets.
- A completed [Institution] Consolidated Bid Sheet, an estimated detailed budget, an estimate for the full scope of work described for the exhibition(s) in its(their) entirety, and the anticipated cash flow. PLEASE NOTE: BUDGET ENTRIES SHOULD BE MADE IN THE SAME ORDER AS THE EXHIBITS LISTED ON THE BID SHEETS.

With their proposal, the Contractor must complete the [RFP title] Bid Sheets.

Each exhibition project includes individual Bid Sheets for each of the exhibit experiences included in this Request for Proposals, as well as a Consolidated Bid Sheet which lists all of the experiences in that project. Each bidder shall use the Bid Forms included in the Bid Documents to prepare their bid. No other bid forms or formats will be allowed except as part of the supplemental information described above (e.g. estimated detailed budgets).

For Bid A on the bid sheets we are asking each bidder to describe the experience that comes as close as possible to the Exhibit Description provided. **Bid A is mandatory.** All blank spaces must be filled in.

Bidders should also review the preliminary equipment lists and identify any issues (e.g., either overkill on equipment or lack of necessary equipment to make the experience work)

[Optional:]

Additionally we are inviting bidders to propose up to three (3) Alternate Bids that provide for cost savings and value engineering. Bidders should include the cost estimate(s) for Alternate Bids on the Bid Sheets, in the spaces allocated, and provide a short description of the experience and any fabrication approach. Submission of Alternate Bids is optional.

Total calculated prices shall be given in both words and figures. These sheets have been included in an electronic form as Excel documents.

Contractors can decide to bid only on one or more exhibitions within this RFP, however, as noted previously, bid submittals should be for the [RFP type] project(s) as a complete package. In other words, Contractors cannot bid on select scopes of work and/or experiences within a single exhibition project. If a Contractor selects not to bid on the entire RFP, please provide the reasoning for your selection(s).

PROPOSED SCOPE OF WORK:

Exhibit Elements Covered by this Request for Proposals

This Request for Proposals covers defined elements for each exhibition. These elements are described in the Scopes of Work section of the Drawings / Descriptions provided for each of the exhibit experiences within each exhibition project. These include the Scopes of Work listed under the header, “General Fabricator” in the Exhibit Descriptions and Drawings.

As mentioned in the “Opening, Evaluation and Contracting” section above, the final scope and thus final fee will be determined in meetings immediately following the award of the work. The actual elements and a list of implementation responsibilities are found for each exhibit in the Scope of Work section of the Exhibit Descriptions and the Exhibit Drawings under the title “of “General Fabricator.” For each of these elements, the Contractor must perform “The Work” as listed in this document.

[Institution] will be operating as Project Manager and Coordinator for the work.

Request for Proposals Overview

Details on the exhibitions and exhibits accompany this Request for Proposals in three forms:

(1) The first is the **Exhibition Overview** documents for [Exhibition(s)], which provide a short summary of the exhibition(s).

(2) The second are **Exhibit Descriptions** for exhibit experiences for:

[List exhibit experiences]

These describe each of the exhibits that are part of each of the RFP exhibition projects, including the educational goals, how the exhibit should operate, the content we are drawing on for each exhibit and a description of the scopes of work. The Contractor should review these carefully, as these indicate the desired operation of the exhibit. Contractors should point out in their RFP any conflict between the designs and their indicated operation.

[Optional under #2:]

Additionally, as part of the Exhibit Descriptions, a tentative equipment list is included as well. As mentioned before, bidders should indicate if they feel the equipment will not allow for a successful exhibit and offer alternates.

(3) The third component set is the **Exhibit Drawings** and an exhibition floorplan(s).

Contract

[Institution] intends to enter into a contract, which will include the fabrication scope of work outlined in the Project Documents.

RFP Scope Clarifications and Exceptions

[List anything applicable]

THE WORK:

All proposals must account for the following scope of work for the elements of the exhibition described in the Scopes of Work section of the Exhibit Descriptions and Drawings listed under the headers, "Scope of Work: General Fabricator." If the offeror recommends additional scope, substitutions and/or value engineering alternatives, it should be clearly described in full with the reasons for the alternative and a separate pricing for its inclusion. The [Institution] Standards provide the details on many points of the work listed below. All work must comply with the following [Institution] standards including:

- **[List any applicable Institutional Standards doc and/or Guidelines]**
- **All applicable [State] Codes**

[Optional:]

In addition, the successful bidder may need to meet with [Institution]'s contracted vendors in the future to detail specialty work as required, and with our multimedia/video software vendors to finalize the scope of work to be performed by the AV Installer.

1. Work Parameters

The Exhibit Descriptions describe in as much detail as possible at this time the design intent, pertinent content and any resources available for each of these exhibits. For each exhibit, bidders must describe in specific terms, the experience in the exhibit they will provide as compared to the description provided in the Exhibit Description. These should be supplied on the bid forms.

There is a place on each Bid Form for estimated costs for Alternates to the exhibits, as regards design, format, materials, etc. Bidders are encouraged to describe alternates that will accomplish a program's objectives while reducing the cost of a program.

Design

The Contractor will be required to produce shop drawings of the exhibit experiences found in this RFP. The Contractor is to collaborate with the [Institution] team to complete the detailed design of the experiences. Creativity must be a strong suit here. [Institution] is looking to improve upon and be innovative with these experiences. As part of the design, engineering or shop drawings, the Contractor may need to work with [Institution]'s lighting Contractor:

[list lighting contact as applicable]

The successful bidder will be able to call on [Lighting Designer] for any lighting questions. The successful bidder will be responsible to work with the AV installer to ensure that lighting does not interfere with the visual elements that the AV installer is providing.

Drawings

The Contractor shall include in their proposal all elements required for a complete exhibition, even if not shown on the attached drawings or design development drawings when complete. For the contract, the Contractor must submit a schedule for fabrication and installation that is approved by [Institution].

All exhibits must have shop drawings that are approved by [Institution] prior to fabrication. Final approval will be from the official [Institution] representative, [Name/Title].

If required, the Contractor shall provide drawings and calculations, stamped by a [State] registered structural engineer, which may be submitted to the required [State] agencies for permits, where necessary. All engineering drawings must be reviewed by [Institution] prior to the start of complete engineering shop drawings. Shop drawings and "As Built" drawings will be a final deliverable in both printed and electronic formats.

Engineering/Permitting

The Contractor is responsible for all necessary engineering and shop drawings of the exhibition, including determining if stamped drawings are necessary.

The Contractor is solely responsible to apply, pay for and obtain all permits required for this project including not limited to: Building and Trade permits from [applicable State agency] for hauling equipment and any and all other City, State and Federal permits required for the execution of this contract. Responsibility includes obtaining engineering drawings by a professional engineer licensed in [State], which may be required by applicable authorities.

In addition to shop drawings the Contractor is responsible for supplying fabrication documentation necessary for the permitting authorities. This may include, but is not limited to materials spec sheets with flame spread information and final equipment lists with power distribution documentation.

Prototyping

As specified in the Scopes of Work, certain exhibits will require prototyping. All prototypes must be reviewed by [Institution], and [Institution] must approve any changes to the exhibit resulting from the prototype prior to final fabrication. The Contractor can suggest elements that do not require prototyping; however, these must be reviewed and approved by [Institution].

Equipment Identification and Acquisition

Early in the design development and engineering process an equipment list with vendor sources shall be provided to [Institution] for review and approval for purchasing, as necessary. A final equipment list with contracted vendors will be required for approval by [Institution]. [Institution] has strong relationships with many industries and may elect to seek donations of some equipment. The Contractor should, at the earliest point, identify fabricators of preferred equipment in order to facilitate [Institution]'s desire to ask for support. The Contractor will be responsible for notifying [Institution] of any conflicts with the approved schedule, should [Institution] seek these donations.

Construction

The Contractor is responsible for the construction of exhibition elements as noted in the Scopes of Work sections of the drawings and Exhibit Operational Descriptions. These include the Scopes of Work listed under the header, "General Fabricator." [Institution] reserves the right to visit the Contractor during construction of the components.

Of special note: If the Contractor is intending to subcontract any work outside of its shop, these Subcontractors must be listed in the response to the Request for Proposals and examples of previous work supplied. Acceptance of the Request for Proposals is NOT an acceptance of these Subcontractors. Once in contract negotiations, [Institution] will reserve the right to review Subcontractors, visit their facilities, talk with references and approve of their inclusion on the job. During fabrication, if a Subcontractor becomes necessary, [Institution] must approve the Subcontractor and reserves the right to review Subcontractors, visit their facilities, talk with references and approve of their inclusion on the job.

Fabrication Coordination

As noted in the Scopes of Work section of the attached Exhibit Descriptions, there [are/may be] other contracted vendors responsible for production and installation work. The successful bidder will be required to work closely with other vendors/contractors to coordinate construction, shipping and installation details and schedules, as required.

Power and Data

Access to power and data for all exhibits will be done through [describe details specific to institution].

[As applicable:]

As noted in the Exhibit Descriptions and Drawings and the detailed Scopes of Work contained therein, the Contractor is responsible for hard-wiring exhibits to the overhead grid as well as supplying convenience power outlets and power strips.

Pretest

The Contractor will provide sample full-scale construction of the proposed designs, as required, for testing before final fabrication.

Shipping and Installation

All components of the exhibition(s) must be shipped and installed complete by the Contractor. The proposal should indicate the intended means of shipping and any shipping concerns due to exhibit configuration.

If needed, Contractor is solely responsible for rigging all equipment into place as designated on plans. Rigging includes lifting, hauling, erection, etc. Should Contractor entertain utilizing cranes for such rigging, Contractor is responsible to perform field engineering test for positioning of crane. Field engineering tests are to include soil borings and a written report by a [State Geophysical Engineer reqt] with recommendations for crane set-up.

Guarantee and Service Contract

The successful bidder will be required to guarantee that all work shall remain free of defects for one (1) full year after the exhibit opening. A one-year service contract should be included in the proposal. Service contracts should cover periodic maintenance and emergency calls as required. Hardware shall be designed and specified so that if there is a failure of a particular component, [Institution] staff can swap out a back-up piece of equipment while the down part is repaired. Bidders shall describe in detail what is included in their proposed service contract. [Refer to [Institution] Standards documents for more information regarding guarantees and service contracts.]

Schedule [sample]

The Contractor's schedule of work must fit within the following estimated project schedule.

[List with dates:]

RFP Issued

Bidders Meeting (optional)

RFP Due

RFP Awarded/Work Commences/Letter of Intent Sent

50% Design/Engineering

Prototyping (as required)

100% Design/Engineering

Shop Drawing Deadline

Fabrication Commences

Fabrication Ends

Burn-In:

Ready for Exhibit Opening:

Warranty

The Contractor must warranty all products, work and services provided for a period of one year after the punch list is completed. The Contractor must turn over all equipment warranties to [Institution].

Standards, Documentation and Training

The Contractor must comply with all standards described in the [Institution] Standards/Guidelines. Any deviation from these standards must be approved by [Institution]. The Contractor will be responsible for complete training of [Institution] staff on the operation, maintenance and service of the exhibits and equipment. A manual will be required that includes operation and upkeep

instructions, drawings, diagrams and equipment lists and vendors. This should be supplied in CD - PC form. A second manual, with simplified operations and “fix-its” for floor staff, is also required.

Notes

[List any other specific information that Bidders should be aware of, e.g. as regards on-site installation work.]

Other Work

If a bidder has identified a scope of work not listed in either the section called “The Work,” nor in “Proposed Scope of Work” that the bidder feels is required to complete the project, then the bidder should assume that scope falls within the bidder’s responsibilities. Any work identified as such must be listed and described separately in the Request for Proposals response and detailed estimates of costs provided.

[As applicable:]

Therefore, the Union Wage and Affirmative Action Regulations apply to any trades work performed on site.

For trade work performed off-site to fabricate the exhibits, Union Wages and Affirmative Action Regulations do not apply. If the onsite work is not trade work, then the regulations do not apply.

[Describe any specific requirements for on-site trade labor work and Affirmative Action Regulations.]

Ownership

[Note: This section should be a summary overview - - with specifics outlined in the contract sample; particularly as regards multimedia projects and 3rd party property.]

Any and all drawings, specifications, studies, electronic data, estimates, inventions, discoveries, improvements, concepts, enhancements, and ideas or any portion thereof that the Contractor may conceive, make, invent or suggest, either solely or jointly with [Institution] or any other person or persons, at any time during the provision of the Services, whether at the request or upon the suggestion of [Institution] or otherwise, and whether or not patentable or copyrightable (any such drawings, specifications, studies, electronic data, estimates, invention, discovery, improvement, concept, enhancement, idea, program or portion thereof and any and all derivative works created or prepared from the foregoing being hereinafter referred to as “Work Product”) shall fully, freely and immediately be communicated by Contractor to [Institution] and shall belong to and be [Institution]’s sole and exclusive property. Contractor shall not at any time, whether during or after the termination or expiration of this Agreement, apply for any letters of patent, design, copyright, trademark, mask work right or other form of protection whatsoever in the United States of America or elsewhere for the Work Product.

Without limiting any other provision of this Agreement, any Work Product qualifying for protection under the copyright laws of the United States shall be considered “works made for hire” under such copyright laws, and shall be the sole and exclusive property of [Institution].

Contractor hereby irrevocably assigns to [Institution] any right, title, or interest Contractor now has or may hereafter acquire in, to, and under all Work Product, and to any patent, copyright, trademark, mask work right, or other proprietary or intellectual property rights or interests in, to, and under such Work Product. [Institution] and its assigns shall be the sole and exclusive owner of all patents, copyrights, trade secrets, mask work rights, and other proprietary or intellectual property right or interest in connection with such Work Product. Contractor agrees to assist [Institution], at

[Institution]’s cost, in every proper way to obtain and from time to time enforce patents, copyrights, trademarks, trade secrets, mask work rights, and all other proprietary and intellectual property rights and interests in the Work Product, and to that end Contractor will execute and deliver or procure the execution and delivery of all documents and other papers and materials for use in applying for, obtaining and enforcing such patents, copyrights, trademarks, mask work rights, and other proprietary and intellectual property rights and interests, as [Institution] may request in writing, together with any assignments thereof to [Institution] or persons designated by it.

Insurance

Insurance requirements are specified in the Sample Contract Template provided as part of the RFP materials.

Bonding [as applicable]

The successful bidder may need to furnish bonds covering faithful performance of the Contract and payment of obligations arising there under as stipulated in this Request for Proposals or specially required in the final Contract Documents on the execution of the Contract.

Bidders should assume the bonding amount to be equal to their bid.

The Form for Bid asks for the cost of establishing that Bond. Bonding costs should be itemized on the Bid Sheets.

Invoicing

[List any requirements specific to the Institution.]

Subcontractor Bid

Please list any subcontractor that you intend to use on this project, their scope of work, and the amount that was included in the bid to cover their work.

Subcontractor’s Scope of Work

(Example: John Doe Acoustics – acoustic set up

Bid

\$XXXX