

A Workshop on How to Complete a Request for Qualifications (RFQ) Submittal Tips

Listed below are several tips to help firms complete RFQ Submittals:

RFQ PLANNING:

- 1) Review the RFQ in its entirety and submit your questions regarding the Checklist, Scope of Work, Timelines and/or Packaging Requirements as instructed prior to the Q&A deadline.
 - a. Keep in mind that no question is a dumb question if the lack of clarification causes your submittal to be incomplete or non-responsive.
- 2) Contact MSD Contract Administration to review copies of RFQs previously submitted for similar projects.
- 3) Further research MSD or the department releasing the RFQ to familiarize yourself with the Scope of Work, organizational structure, language, recently completed projects and experiences of the team.
- 4) Request current contact information, references and letters of recommendation from clients (other than MSD) for projects of similar size and scope completed by your firm. It is not recommended that MSD staff be listed as your references.

RFQ CONTENT:

- 1) Be very specific in your responses by completing the following tasks:
 - a. Answer “ALL” questions directly, honestly and accurately. Overcomplicating your responses may make it difficult for reviewers to draw desired conclusions.
 - b. Effectively illustrate your organizational strengths and industry niches.
 - c. Recommend solutions that cover the entire scope of work and align with MSD or the department requesting the RFQ.
 - d. Intentionally incorporate MSD’s language and culture into your approach to the project.
 - e. Visit www.msdbg.org daily to view announcements, responses and addendums related to the open RFQs prior to your submittal.
- 2) Submit Resumes and Organizational Charts that closely match the skills and relevant work experiences of key personnel to the responsibilities of the proposed project team.
- 3) Include viable work samples and verifiable references for projects of similar size and scope recently completed by your firm. These samples should be for clients other than MSD (as much as possible). If necessary, explain any schedule or change orders in detail.

- 4) Effectively use artwork (illustrations, images, page layouts, smart charts, data tables and captions) to develop a professional submittal and to “*help tell your story*”. Inadequate or poor use of artwork could negatively affect the reviewers perception of your desired outcomes.
- 5) Insert a detailed Table of Contents that includes section headers and alphabetized lists of key content.
- 6) Take advantage of the unlimited pages allowed in the Appendix of your submittal. Sample attachments may include but are not limited to:
 - a. Capability Statements and related marketing materials
 - b. Detailed resumes of key personnel using a single professional format that highlights related experiences. Do not include photographs or headshots on the resumes.
 - c. Letters of recommendation, media clippings and other documents related to projects recently completed by your firm of similar size and scope for clients other than MSD.
 - d. Industry recognitions and awards

RFQ PACKAGING AND DELIVERY:

- 1) Review the RFQ Checklist to ensure that all required components of your submittal are appropriately addressed.
- 2) Adhere to the required formatting, font, spacing and page limitations outlined in the RFQ.
- 3) Include a footer on your RFQ.
 - a. Ex. Name of RFQ, Firm name and Page x of xx (total number of pages).
- 4) Ask one or more persons to proofread your final document to confirm that the content is clear and to check for spelling, grammar, formatting and spacing errors.
- 5) Prepare the appropriate number of originals and copies of your submittal as outlined in the RFQ.
- 6) Bind your submittals in a professional manner with secure materials such as GBC binding (spiral binding) or as specified in the RFQ.
- 7) Deliver your submittals to the appropriate location prior to the deadline posted on the RFQ.

POST RFQ DELIVERY:

- 1) Follow up with your references. Confirm their receipt and completion of requested forms and participation in telephone interviews.
- 2) Visit www.msdbg.org to view updates, addendums and award announcements related to the RFQ for which your firm submitted.
- 3) Regardless of whether your firm was not selected, request a follow-up meeting with MSD Contract Administration staff to review your submittal and learn ways to improve for future RFQ. Also, ask to see copies of the RFQs that were selected.