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NONPROFIT'S GUIDE

WORKING WITH DESIGN PROFESSIONALS

A discussion about what it takes to successfully work with design professionals. This guide provides an architect's reasoning as well as common pitfalls to avoid.

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Overview

When working with design professionals, nonprofit organizations face unique challenges that require thoughtful planning and careful selection of partners. This guide provides valuable insights for navigating the complex process of choosing the right design team, from understanding the scope of the project to assessing budget constraints and ensuring compatibility with the organization's mission. By following a strategic approach, nonprofit organizations (NPO's) can effectively manage the design process, ensuring their projects align with both their goals and the communities they serve.

The passion that leaders, staff and board members bring to the not-for-profit agencies they work and volunteer for is amazing. NPO's rely on that energy to grow and continue to support communities according to their mission.

Often, NPO's find themselves in the position of needing to increase their physical plant, renovate a donated property, or develop a master plan for growth in the future. Their solution to needing the assistance of a design professional – engineer, architect, landscape architect or other specialty consultant, is to write a Request for Proposals (RFP) or Request for Qualifications (RFQ) and post it on their website, distribute it to firms that board members recommend, or seek to develop a list of firms to invite to respond.

Whatever the circumstance, writing and reviewing an RFP/RFQ and interviewing and selecting a Desing Team is a lot of work. It is often best handled by a board sub-committee – Facilities Committee or a specially founded Master Plan Committee. That committee is usually comprised of people with at least tangential relationships to building, design, fund-raising, etc. The named committee can then do the job of selecting that team and reporting back to the Board for final approval. Keeping committees small is usually the best approach.

Understanding the Scope

Perhaps the biggest challenge is understanding the scope of what needs to be done. An agency may think they need a rendering to generate excitement around the project. And while this may in fact generate interest it doesn't resolve the fundamental issue of what to do.

"Often the obvious path isn't the best one"

- Renovation of a building that needs extensive work could prove to be a more costly direction.
- Building new is an answer to needing more space, but what if there is existing space that isn't being used efficiently?
- Understanding what type of design professional, they need to hire and how an architect could assemble a team.
- Writing an RFP or RFQ that is overly complex with the intent of protecting the organization, but perhaps misses the point of the project or the specific needs.

"Not knowing what you don't know is a dangerous position to be in."

Having board members with architecture/engineering/facilities knowledge is wonderful, but does their experience match the scope and scale of the organization? An RFP that is of a level of complexity necessary for a multi-national corporation is not the same as an RFP for a regional NPO.

Defining the scope of the project is not easy. It can be affected by local zoning ordinances, building codes or existing conditions. Converting a church into a concert hall should be easy, they are both places of assembly, but in some cases, they are different enough that restroom requirement, egress paths and fire suppression systems may all need to change or be added; before any design work can begin.

The best path may be to define the scope as best as possible, but to seek a trusted partner to flesh out the scope. A rigorous review by a design professional with multiple questions and assessments will help shape the scope and the scale of the project. Understanding hurdles that are understood by Architects and Engineers but not necessarily by a layperson can shed light on the scope of any project.

"How much is this going to cost"

A supremely valid question any administrator or board member should ask. But the answer to that question is not easy. Construction costs are still fluctuating post pandemic and often individuals are surprised are how much building costs. Board member optimism, incorrect facts and not understanding the scope can all lead to setting a budget that is too low or too high.

"We have $2.5 million to apply to this project, how much can we do with that?"

This question is equally difficult, especially if there are extensive infrastructure issues to address or costly historic preservation regulations to comply with.

This may seem like a leap of faith, but seeking the advice of a design professional before setting a budget is often the best path. A responsible professional can create a scope around various budgets. This can happen after any “must do’s” (required or desired) are addressed. Regardless of how astute or conscious of the project a design professional is, they will need to ask multiple questions to help understand the project scope and potential phasing.

"How do we choose a team?"

A qualifications-based approach is best. It will help you to find a design partner who can work with you. Qualifications are not the end-all to finding a partner. Similar backgrounds, or ways of working can be equally important. You want to find the right fit. A design professional who has designed countless music centers, for example, may not be the right fit if they are accustomed to higher budgets, larger organizations, or urban settings instead of rural.

Ultimately, you should try to make your RFP as simple as possible and easy for you and your committee to review. Overly complex RFP's will take more time to review, and the information requested may not make a significant impact on the selection of the team.

"What questions should we ask?"

1. Interest
2. Experience
3. Nonprofit Experience
4. Fundraising
5. Sustainability | Green Design
6. Team | Lead Firm
7. Team | Consultant Team
8. Developing a Budget
9. Fee
10. Availability
11. References
12. Other Questions

"But why THESE questions?"

Interest

This is an opportunity to determine their passion. Passion is paramount. Anyone who is engaged will work harder and better for the good of the project – architect, board members, executive directors, etc.

Experience

Have they done similar projects? This may be an obvious question, but as discussed above, consider how their experience will benefit you. A prospective Design Professional may not have designed a music center, but they may show you in response to your question, several projects for nonprofits or similar size. Do they have specialty consultants to handle the technical work specific to your project. Similar projects should be a broad topic.

Working with a nonprofit organization| Experience

This addresses the "good fit" issue. If they have worked with nonprofits, do they (hopefully) understand the realities of your nonprofit? Do they understand generally how your capital campaign will go and how they can help you with it? Do they understand your mission, the community you serve?

Working with a nonprofit organization | Fundraising

How has your potential design professional interfaced with fundraising committees, capital campaign consultants, and general fundraising efforts? Can they supply the necessary collateral – renderings, plans, narratives? Can they provide more? Renderings showing naming opportunities, meeting with potential large donors to explain the design concept to them? Donors often respond positively to being an "insider" when it comes to project details. This is all another facet of understanding how to work with nonprofits. Understanding that money needs to be raised and that the design professional can have an active role in that process.

"But why THESE questions?"

Sustainability | Green Design

Most nonprofit organizations are sincerely aware of environmental considerations in operating and growing a business. It seems all Architects will speak about green design and care for the environment, but how does that translate to their practice. Building "green" can be more expensive initially, but it can also have a short return-on-investment. Tuning the green building measures to the budget is important. The design professional explaining why they chose to incorporate measures and discussing how they affected the budget is very important. Some "green" measures are lower cost, more easily attainable, or make sense for the nature of the project. Some NPO's want to set an example of how to build "green." Just as personality fit is important, finding a design professional who can adapt their approach to green design to yours is crucial. They should recommend and suggest measures that become the beginning of a conversation. "Green" building is crucial to our success, but it must be weighed and balanced against the scope of the project.

Team | Lead Firm

Who will be working on the project. Proposals will come from firms of multiple sizes – larger firms may have a dedicated marketing professional who prepare the response, smaller firms may sweat all the details while continuing to run their practice. Neither one of these extremes is necessarily positive or negative, but you will want to know who you will be working with on a day-to-day basis. A firm that shows depth and can connect with your organization on multiple levels is an excellent partner. In our practice we have one individual who has experience as a facilities manager, he understands the day to day of operating a facility. What similarities exist between the potential design professional team and your organization.

Team | Consultant Team

Most teams are led by Architects. A great team will include the necessary sub-consultants to deliver the project. Of a side note, a study or master plan may not need a structural engineer for the initial project, but understanding who that sub-consultant is when and if they are needed can show the potential depth of a team. Does the team have the necessary sub-consultants? Your music center will need an acoustic engineer. If one isn't recommended, you should ask who your potential design professional would suggest. Have they worked with them before? Or, if you don't know which consultants you need, ask the design professional what types of sub-consultants they feel are needed for the project. Remember, the design professional will have limited information on your project while they are writing their response to your request for a proposal. Hopefully, they will suggest a larger team than you need, understanding that not all consultants will be needed or have a major role.

"But why THESE questions?"

Developing a Budget

How and when does the design professional help you to develop a budget and/or the cost of constructing the project. They may have extensive experience with pricing themselves, they may work with an independent consultant, or they may have industry partners like construction management firms they discuss project costs with. Ultimately, the contractor or construction manager will help to establish a budget for the actual built project. What you need initially is a relatively accurate estimate of cost based on the know aspects of the project. You should also understand that when you establish a budget, it is difficult to predict escalation, the percentage of cost increase that happens each year. A $1,000,000 budget today could be $1,166,400 at the time of construction if it is two years aways and we experience 8% escalation consecutively.

Fee

This is perhaps one of the most challenging requirements of a response that a design professional can face. It can be extremely difficult to put a fee on a project without knowing the full scope or knowing if the scope will change. Should the fee be a lump sum, a percentage of construction, a menu of items? The design professional will be concerned that their fee may include more than another firm's fee and the entire proposal rejected for being too high a cost. It is also extremely hard for the fee proposal to be apples to apples across multiple submissions. In the municipal realm, fees are established by a chart with allowances for complexity and not part of the proposal. The fee is part of the negotiation with the team selected by qualifications and if an agreement isn't possible, the next highest rated respondent is considered. This, of course, does not answer the not-for-profit's desire to understand and control the cost of professional fees. Because of the usual lack of comparability in scope between responses to a request for proposal, fees should not be the primary factor in deciding whom to work with. The "right fit" may not be the cheapest option or even the most expensive. We recommend that fees not be a major part of the selection process. A savvy design professional may offer alternative fees for additional services to help you understand that services they believe you need but want to be comparable to other submitters. Slightly cunning design professionals may assume the lowest scope of services to keep their fee low and try to negotiate additional fees for services that were not included. In either case, it is evident that consistency in a fee proposal is challenging and often better to be a conversation rather than an absolute. Most design professionals will admit that they would rather not work for a client who is only looking for the lowest fee and not basing their selection on qualifications and compatibility.

"But why THESE questions?"

References

Ask for three references and be prepared to call them and get an opinion from someone else about the firm.

Other Questions

There are most likely many additional questions that could be asked of the proposing design professional. Those that are uniquely specific to the project should be asked. Have you ever worked with federal funding, buy American acts, worked with large community committees? Asking on the RFP for any additional information that the submitter deems necessary and appropriate is one way to allow for additional information. Unique questions could also be reserved for in-person interviews or as part of a round two in the process.

"Who should we invite?"

"Fully public or Private?"

Fully Public

This method will generate the highest number of responses. It will also require the most amount of work by the review committee. Unless there is some pertinent reason for using a fully open call – bylaws, requirement of the organizations, funding source, etc. it is often better to keep the list smaller and not wide open. This will of course rule out any unknown rising stars in the architecture world.

A fully public call will also most likely get picked up by listing sources and will most likely attract responses from further afield. If the Board is interested in a more local design team, the open call is also not recommended.

Invited

The invited method has shown great success in the selection of a design team. Firms can found by asking:

- Board members for recommendations
- Other not-for-profits who they used
- Local College and University architecture departments, they will know the capabilities of firms.
- Capital Campaign consultants, Plumbers/Electricians or other trade professionals who work with the organization, etc.
- Local chapter of the AIA for a list of possible firms or firms registered in the State.

Once a list is generated, the RFP/RFQ can be sent to them and ask of their interest. A request that they respond to the call with an expression of interest, email can suffice for this unless more formality is needed.

Invited+

An extra step in the process of an invited list, but one that can lead to a more refined, smaller pool of applicants, is to invite members of the invite list to an in person meeting. After an initial meeting the committee, chair of the committee or executive director can decide if they should be invited to submit.

" Why shouldn't we get the max number of applicants?"

We recommend you try to keep the invite list to three of four teams. The amount of time and work required for each team to respond in a robust manner is great. It will take time away from billable hours for the firm and incur cost in both staff and materials. A firm may decide not to submit if there are too many invitees.

Why wouldn't an interested firm submit?

Some design firms have a formal in-house go/no-go process for responding to RFPs/RFQs. It is usually a checklist that asks such questions as:

- How many firms are invited?
- Is it an open or closed invite list?
- Do we know the client or have any connection to them?
- Is this a type of project we have experience or interest in?
- Is a fee proposal required?
- Do we have the staff and availability to do the work?
- Is the client organized or does the request seem haphazard?

The answers to the questions and others like them are ranked and added and it will aid in the decision to pursue or not pursue the request. Firms want to work with engaged clients and will go through a similar interview process of requestors as well. Remember, a mis-matched relationship of client and design firm can lead to a less successful project. All members of the relationship should consider whom they agree to work with.

"Should we do a walkthrough?

Regardless of whether initial interviews are made with the design firm, scheduling a formal walk through of the site/project is beneficial to all. It is an opportunity to meet firms in person, collect questions and relay nuances of the project that are not easy to do so in a written request.

What documentation should we send out after we conduct a walkthrough?

A list of attendees should be recorded. Questions asked during the walkthrough should be recorded and answered and answered in writingwithin a few days by email to all invitees, regardless of whether they attended the walkthrough or not.

Attendance at the walkthrough can be made to be required or not required. There are sometimes scheduling conflicts to address if attendance is a requirement.

"All the proposals are professional, what should I look for?

Reviewing proposals

Proposals should be required to be received by a set date and time. Receipt should be recorded. This process does become a bit formal in the interest of fairness.

Review of proposals can be done as a group or individually prior to a group meeting. A standard rubric of measuring and ranking the firms is often helpful. It can be loosely based on the questions asked.

Particular attention should be paid to how a firm responds. Does it appear to be all standard information or is it the response tailored to the request. A more bespoke response can indicate a higher level of interest or at least a certain level of engagement. Creativity in the response can translate to the creativity of the firm.

Interviews

The responses should be ranked, and a short list made for the interview. If there is one, clear standout consideration can be made to hiring without interview. This will however not allow for getting to know all the firms before making a final selection. This said, occasionally firms are hired after simply the response.

We recommend no more than three teams to be interviewed. Much like preparing the response, considerable time goes into preparing for an interview. Selecting more than three firms reduces the odds of a firm being successful in their effort. Mutual respect for each organization's time is important.

Asking for Conceptual Design work to "see how they think"

Tempting.... but we would recomend against this.

- This only increases the amount of work that a submitter must do to try to win your project.
- Design work that is done outside of thoughtful conversations with you and your team is not as focused on your project. The design team will be making many assumptions about you and your organization. The chance that one firm will "knock it out of the park" isn't worth the risk of bad assumptions keeping you from selecting the best firm because they couldn't guess what you were hoping for.
- Style is relative, function is important. These criteria should come from thoughtful conversation.

If you really want to have prospective design work done for your project, you should establish a stipend for each firm and a specialized packet of information to help compensate them for their effort. Expecting free ideas from design firms is not respectful.

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A successful RFP/RFQ process is a lot of work. Mutual respect and understanding of that time commitment is a great step in managing the process. The goal is to find the right partners for your project. Sometimes it is obvious from the beginning whom you should work with and other times it can be a surprise to discover a firm with a similar sense of ethics, work style and general institutional compatibility.

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