

**RFP/RFQ**

**for  
Concept & Schematic Design Services**

**for  
Outdoor Garden Enhancements**

**to  
Cleveland Botanical Garden**

**Process facilitated by  
Smithink**

**Distributed: October 30, 2012  
Responses Due by: November 21, 2012, 5:00 pm ET**

## **A. PREFACE**

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The Cleveland Botanical Garden is seeking qualified firms to provide Concept and Schematic Design services for a variety of enhancements to several of its outdoor garden environments.

The purpose of this RFP/RFQ is to obtain responses of interested parties as to their qualifications, the scope of services they would provide and the timeline for which they would perform the identified work to a fixed (maximum) professional fee.

It is intended that these responses, possibly in conjunction with a follow-up interview, will provide adequate guidance for the Garden to select a firm (or Design Team) to perform the services described within this RFP/RFQ.

Funds for supporting the professional fees associated with the work described below have been secured, and the Garden intends to have the work commence immediately following the selection process.

Responses to this RFP/RFQ by interested firms are to be received by the recipients listed below no later than 5:00 pm ET on November 21, 2012.

## **B. BACKGROUND INFORMATION**

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***“To spark a passion for plants and cultivate an understanding of their vital relationship to people and the environment.”***

- Cleveland Botanical Garden Mission Statement

Cleveland Botanical Garden is a gem in Cleveland’s University Circle neighborhood, showcasing the plant world’s natural beauty and its vital contributions to all life. Guests of the Garden can experience 20 exquisite specialty gardens and exotic indoor biomes for year-round escape and delight. Founded in 1930 as the Garden Center of Cleveland, Cleveland Botanical Garden has evolved into a community treasure among Cleveland’s cultural institutions.

The Garden’s experts are trusted and important resources on issues related to conserving the environment, plant-based health and nutrition, plant science, and best horticultural practices for the home or community at-large.

The Garden’s community involvement extends beyond its 10 acres in University Circle into city neighborhoods through its Green Corps program. Since 1996, Green

Corps has enlightened area youth with the significant growth opportunities urban farming has to offer themselves, as well as their friends and families.

Through its people and programs, Cleveland Botanical Garden is committed to creating an ever more vibrant tomorrow.

As a result of this commitment, over the last 18 months, the Garden has undertaken a significant strategic planning process whereby several key priorities were established. These included:

- a. Enhancing the Garden's Brand
  - An overall plan to relaunch the Garden's brand was developed.
  - A clear articulation of the Garden's brand was established, which included the development of a *Brand Expression Guide*.
  - New photography of the Garden was executed to support the Garden's brand positioning and to connect with the Garden's key target audiences.
  - A new website was created and launched that enhances the Garden's brand and advances the Garden's earned revenue strategy.
- b. Growing Earned Revenue
  - An overall plan to strengthen the Garden's earned revenue was developed.
  - One element of the plan includes the production of seasonal special events intended to appeal to primary target audiences of the Garden.
  - Another element of the plan, relevant to this RFP/RFQ, is the identification of physical improvements to the Garden's campus and buildings. Many of the enhancements identified are expected to contribute toward increasing the Garden's future earned revenue, which importantly includes strengthening the Garden's ability to host private events (such as weddings, private parties, etc.).
  - Implementation of portions of this plan are already underway, with the first phase of indoor building renovations scheduled to be completed November, 2012. These renovations will directly contribute to stronger earned revenue as a result of the Garden's ability to host an increased number of private events.
- c. Audience Identification
  - The Garden has identified its key target audiences. These include:
    - Garden lovers
    - Families with young children
    - Sophisticated Millennials
    - Private Rentals audience
- d. Guest Experiences
  - The Garden is committed to moving beyond the typical botanical garden experience, which is primarily about "viewing". Cleveland Botanical Garden desires to expand its guest experiences more into the realm of "doing" and having activities that touch all the senses to engage its visitors more deeply.

It is the intent of this RFP/RFQ to initiate the development of some of identified outdoor capital improvement projects that will contribute toward strengthening the degree to which earned revenue can be generated from the Garden campus, as well as enhancing the guest experience for all visitors to the Garden.

## **C. PROJECT INFORMATION**

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### **Investment Goals**

It is the desire of the Garden to invest approximately \$5.3 million in capital funds towards making enhancements to four (4) of its garden environments such that they provide:

- Enhanced beauty to the overall Garden
- Strengthened experiences for guests
- Increased ability to generate earned revenue

Generally, the scope of work that the Garden desires to complete with a Design Team selected through this RFP/RFQ process is Concept and Schematic Design Services that:

- Generate creative, strong design solutions that meet the project objectives
- Clearly articulate proposed enhancement designs (through drawings, narratives, etc.), adequate for endorsement by management and the Garden's Board of Directors
- Provide reasonably accurate cost estimates (and/or allocations) in alignment with proposed designs, as well as a timelines for fulfillment
- Serve to support efforts to generate additional development funds, allowing the Concept and Schematic Design work to be realized

(a more detailed description of the desired scope of services is articulated below).

Due to the goals stated above and the nature of the (4) garden environments, it is the desire of the Garden to have all of this work performed in a comprehensive manner (ie. from a "mini-master plan" perspective), while at the same time providing deliverables so that subsequent phases of work for each of the (4) garden environments can be fulfilled individually as funds become available.

### **Garden Environments**

The Garden has identified the following four (4) areas that it seeks to enhance:

1. Sunken Garden
2. Hosta Hill
3. Geis Terrace
4. Field House at the Garden Commons

With the exception of the Field House, each of these of these Garden environments is currently a guest area that the Garden seeks to enhance.

(see Exhibit A for the locations of these areas)

## **Design Goals**

It is the desire of the Garden to have the design goals fulfill the Investment Goals as stated above, as well as appropriately complement (and integrate) with the overall beauty of the Garden.

The Garden has identified additional and more specific design goals associated with each of the individual Garden Environments. These are articulated in Exhibit B.

Finally, it should be noted that the reason the Garden desires to develop these (4) projects concurrently is that the usage inter-relationships among these environments is critical in terms of flexibility, privacy, experiential transition and maximization of earned revenue potential.

As stated above, a “mini-master plan” of the (4) Garden Environments that addresses their use relationships among each other as well as their relationship with the Garden as a whole is expected to be an important first step in the design process.

## **Budgets**

The budget amount for professional fees associated with the work described within this RFP/RFQ shall not exceed \$65,000. This amount excludes normal reimbursable expenses that shall be identified and estimated as described in the Submittal section below.

The total project budget for the enhancement of all (4) Garden Environments is planned to be approximately \$5.0 million, currently allocated as follows:

- Sunken Garden: +/- \$2.5 million
- Hosta Hill: +/- \$300,000
- Geis Terrace: +/- \$1.0 million
- Field House at the Garden Commons: +/- \$1.2 million

These budget numbers include design fees, contractor fees, construction costs and contingencies.

## **Timeline**

As this design phase gets underway and is completed, the Garden would like to maintain the possibility of having one or more of the (4) Garden Environments completed by the end of April, 2014. At this time it is uncertain how many of the projects will be funded adequately to maintain this schedule, but design work should commence in anticipation that all (4) environments will be funded.

Key dates related to the scope of work within this RFP/RFQ are as follows:

- |                  |                                                    |
|------------------|----------------------------------------------------|
| October, 2012:   | RFP/RFQ distributed                                |
| November, 2012:  | RFP/RFQ responses received                         |
| Nov./Dec., 2012: | Interviews of “short list” respondents (if needed) |
| December, 2012:  | Design team selected                               |
| March 15, 2013:  | Concept and Schematic Design Phase complete        |

Note that the manner in which the subsequent design and construction phases shall be undertaken has not yet been determined. Among the alternatives to be evaluated following this Concept and Schematic Design phase will be the conventional design/bid process, as well as a design/build approach and also a GMAX negotiated contracted. It is expected that during the Concept and Schematic Design phase, these alternatives will be discussed and recommendations made to allow the Garden to get the greatest value from its available funds.

#### **D. DESIGN TEAM & DESIGN PROCESS HIGHLIGHTS**

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##### **Landscape Architect**

It is anticipated that the Landscape Architect will lead a Design Team that will execute the work described within this RFP/RFQ. It will therefore be the Landscape Architect's responsibility that the Concept and Schematic Design work be performed in accordance with an agreed upon performance schedule and to generate design solutions that fit reasonably within the Garden's budget parameters, as well as fulfill the Garden's design criteria.

It is expected that the design team may include partner and/or subcontracted consulting firms. As such, the selected Landscape Architect's responsibility will include managing, directing and coordinating all work performed by such firms as well as appropriately preparing documents for owner review.

Identification and description of such firms, their relevant work experience and the manner in which they are expected to contribute shall be included in the response to this RFP/RFQ, as identified in the Submittal section below. As well, identification of relevant experience whereby the Landscape Architect has led similar design teams is also requested as part of the Submittal.

##### **Owner's Representative & Garden Representative**

The Garden has contracted with an Owner's Representative to facilitate the RFP process and the Concept and Schematic Design work as described within this RFP/RFQ. This RFP/RFQ process is being managed by Smithink ([www.smithinkusa.com](http://www.smithinkusa.com)), a strategic consulting firm retained by Cleveland Botanical Garden.

Should recipients of the RFP/RFQ be interested in visiting the Garden in relation to the work described, the Garden Representative identified below may be contacted to schedule an appropriate tour.

Please note, however, that all questions related to the scope of this RFP/RFQ and submittal shall be addressed to the Owner's Representative (Smithink) identified below.

##### **Concept and Schematic Design Reviews**

Design charrettes, workshops and periodic design reviews will be scheduled and generally co-facilitated by the Owner's Representative and the selected Landscape Architect in conjunction with the design process of the selected firm.

Participants will include appropriate members of the Garden's management team, as determined by a coordinated effort between the Landscape Architect, the Garden and the Owner's Representative.

Board representatives may also be involved at various levels of the review process, but it is not expected that any additional presentations by the Landscape Architect or the Design Team will be required beyond those with the Garden management team.

### **Concept and Schematic Design**

As a starting point for establishing what the Garden envisions as "Concept and Schematic Design" for the purposes of this RFP/RFQ, the process is expected to begin with a site visit and workshops and/or design charrettes that involve members of the Garden's management team, the Owner's Representative and members of the selected firm. Firms will then develop several alternative "high level" creative design solutions (concepts) and present them back to the Garden and Owner's Representative with pros/cons. Included with this will be the generation and review of a "mini master plan" of the Garden Environments and related areas.

Upon selection of a "high concept" the Design Team will incorporate requested modifications and commence Schematic Design, after obtaining the Garden's approval on the concept with which they seek to move forward. Deliverables at the end of the Schematic Design phase are generally expected to include:

- Narrative describing overall project, intended goals, uses and guest experience
- Comprehensive site/master plan for all (4) projects combined
- Individual site plans and landscape plans for each Garden environment
- Program that articulates individual components of each project, including plant material, hardscape materials, square footages, etc.
- Dimensioned floor plans, sections and elevations of proposed building structures
- Description, narrative, sketches and/or reference materials for art design elements
- Design or narrative describing mechanical, lighting and other elements not identified in the drawings
- Construction cost estimate (based on volume/size/areas)
- Timeline for completion

*Note: This basic description is intended to be directional only. Respondents are expected to specifically articulate their approach and deliverables, and will be evaluated solely on their response.*

## **E. SELECTION CRITERIA**

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Responses to this RFP/RFQ will be evaluated on the merits/qualifications of the proposed Design Team, on the scope of work and deliverables identified, and on the performance schedule for completing such work as described in the Submittal.

Cleveland Botanical Garden and the Owner's Representative will review proposals and may invite qualified candidates for interviews. At the interview stage, candidates will be asked to elaborate on their experience and qualifications. In addition, each team's collaborative approach to the project, timing issues and costs will be reviewed in more detail.

The selection team will be comprised of members of the Garden's management team, the Garden's Owner Representative and selected members of the Garden's Board.

## **F. SUBMITTAL**

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### **Format**

It is requested that all submitted material be in an 8 ½" x 11" size, with final documents to be in both hard copy and digital (pdf) format. A Table of Contents shall be included that appropriately references numbered pages within the document.

### **Copies**

Five (5) hard copies should be mailed to the Garden's Representative listed below. One (1) digital copy shall be sent to the Garden's Representative listed below.

One (1) hard copy shall be mailed to the Owner's Representative listed below.

One (1) digital copy shall be sent to the Owner's Representative listed below.

### **Submittal Content**

- a. Cover
  - Project name (Cleveland Botanical Garden Outdoor Enhancements: Concept & Schematic Design) and the name of the submitting Landscape Architecture firm.
- b. Letter of Interest
  - Provide a concise one-page letter that summarizes the Landscape Architect's particular interest in the project, key qualifications and the firms it intends to partner with. This letter should also highlight any critical concerns, assumptions or potential circumstances that the Landscape Architect foresees as inhibiting fulfillment of the desired design work described. In addition, please identify key contact information for the Landscape Architects, including name, phone and e-mail address.
- c. Table of Contents
  - Appropriately referencing numbered pages for the following content.
- d. Design Team & Qualifications



- List of all partnering firms and/or consultants that will work on this project. For each firm (including Landscape Architect):
  - Identify role and responsibility, the firm's approximate % of contribution to the total project, and key deliverables.
  - Identify key staff that will work on the project and describe their roles (and relative percentage of contribution to the project).
  - List (in one paragraph or in short bullet points) qualifications and background for each staff member listed above that is relevant to the work for which they will perform on this project.
- Provide an organizational chart for the overall proposed design team.
- e. Relevant Experience
  - Provide a project description and illustrations of not more than six (6) relevant projects. Of particular interest are projects that are:
    - Similar in nature to this project
    - For non-profit organizations and/or cultural institutions
    - "Experience Destinations" for which there is an admission cost
    - Revenue-producing projects, particularly for events or private parties
  - For each project:
    - Identify location and date when work was performed.
    - Describe overall project objectives, scope and include project budget.
    - Specifically describe what work was performed by the Landscape Architect (or design team member) and identify personnel (relevant to this RFP) responsible for each and their relationship to the project.
    - Where possible, describe resulting performance metrics as specifically as possible (ie revenue, attendance, etc) .
  - Note: Since this RFP/RFQ pertains to Concept and Schematic Design work, respondents can choose to reference projects that have not yet been built. However, it is expected that a majority of the projects listed will have been completed.
- f. Design Process
  - Describe, in no more than 2 pages, the design process that the Landscape Architect and the design team are expected to take in order to fulfill the content of this RFP. Please indicate design phases and who is expected to be involved at the various phases.
  - Describe the approach that will be taken to address overall project costs and the allocation of funds among the Garden environments to ensure that the scope of the overall proposed work is within 15% of the Garden's budget.
- g. Deliverables
  - List the deliverables that the Garden should expect to receive at each phase and at the conclusion of the performance of this work. Of particular relevance are documents that support the Garden's efforts

to raise funds for subsequent project phases and documents that allow the Design Development to seamlessly commence when funded.

- Provide examples, where possible, of the above deliverables (particularly for illustrative deliverables). Examples can be referenced from the response to “Relevant Experience” above.
- h. Timeline
  - Provide a timeline that reflects the design process described above and identify key milestones.
- i. Fees & Costs
  - Indicate the professional fee for performing the work described above (not to exceed \$65,000).
  - Identify items excluded from this fee, and provide an estimate of those total costs.
- j. Reference
  - Provide a minimum of three (3) contact references for each firm and briefly describe the relevance of each reference.
- k. Addenda Items
  - Any addenda items should be clearly identified as to their content and relevant purpose for being included within this RFP response. These items should also be paginated and included in the Table of Contents.

**Due Date**

Submittals are to be received no later than 5:00pm eastern time on Wednesday, November 21, 2012.

**G. ADDITIONAL INFORMATION**

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A 60-minute conference call to answer questions regarding this RFP is scheduled as follows:

2:00 pm (eastern time zone)  
Wednesday, November 7, 2012  
Call-in conference number: 605-475-4875  
Access code: 259 598#

This call will be hosted by the Owner’s Representative, and is optional for respondents.

**H. ATTACHMENTS**

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Exhibits A, B are provided as a separate document

**I. KEY CONTACTS**

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For questions concerning the content of this RFP/RFQ:  
Owner’s Representative:

David Smith  
Smithink, Inc.  
[david@smithinkusa.com](mailto:david@smithinkusa.com)  
314.609.0305

To schedule a visit to the Garden concerning this RFP/RFQ:

Garden Representative:

Cynthia Druckenbrod  
Director of Horticulture  
[cdruckenbrod@cbgarden.org](mailto:cdruckenbrod@cbgarden.org)  
216.707.2824