

Attachment B: Symbols-Based Wayfinding Program Design and Implementation Check List

Universal Symbols in Health Care



Before working with an environmental graphic design firm or wayfinding consultant on a symbols-based wayfinding program, it is important to have some basic information about the health care facility and goals for symbols integration. This information can be incorporated into the design RFP and RFQ and act as a guide for ongoing design development.

The Mission Statement

The mission statement is the road map that the health care facility needs to develop a wayfinding program, the crucial stage where a symbols strategy is integrated into program goals. The mission statement includes the following information:

- Description of the facility
- Wayfinding goals including incorporation of symbols
- Wayfinding issues
- Key project stakeholders

Destination Criteria

Destination criteria include how destinations are selected and named by the health care facility and their importance in the facility. Symbols are integrated into the wayfinding program through the selection of destinations. Destination criteria should include the following elements:

- Health care campus identity and key building names
- Key departments in the facility

- Support health care destinations (e.g., billing, medical records)
- General support functions (e.g., parking, cafeteria)
- Room addresses

Schematic Design Stage

This is the stage where the overall design strategy is articulated by the designer and communicated to the health care facility. Often the schematic design stage is developed as a separate design program, providing a roadmap for ongoing implementation of the program. Symbols are incorporated into the wayfinding strategy and specific design elements at this stage. The schematic design stage includes the following elements:

- Overall wayfinding strategy including integration of symbols
- Destination criteria
- Wayfinding experience diagram including stages in the wayfinding experience with specific design elements at each decision point
- Design vocabulary of design elements
- Typography, color, and symbol palette
- Plan for implementation including preliminary cost analysis

Design Implementation Stage

The final design and approaches for implementing the program include:

- Strategy for placement of sign elements
- Schedule that determines placement of information on signs
- Final fabricator design drawings for bid process

- Final list and hierarchy of destinations
- Plan for fabrication and installation

Guidelines

Health care wayfinding programs are ongoing programs and need a clear set of instructions for facilities staff to follow to ensure the program can be changed and maintained. Guidelines include:

- Review of the design strategy of the institution including incorporation of symbols
- Strategy for incorporation of new destinations into the existing destination criteria
- As-built drawings of final wayfinding elements with instructions for fabrication and implementation
- Support graphics including all symbols, colors, font standards, and print graphics
- Instructions for ongoing management and maintenance of the program

The RFP and RFQ are documents that health care facilities use to find a design firm for a design project. Designers can be employed either as a direct hire or as part of a bidding process, but no matter which method is used it is important for the facility to create a proposal structure with a specific set of goals or deliverables.

What is Needed for an RFP?

To create an RFP, it is important that the client has a full understanding of the basic tasks the designer will be expected to accomplish.

The RFP is meant to provide a specific proposal for the design team including:

- A summary of the entire project scope
- Preliminary design strategy and goals
- Specific scope of services including all major deliverables at each stage of the project
- Outline of what must be provided in the proposal
- Proposal submission guidelines and standards
- Project time-line
- Fee proposal

What is Needed for an RFQ?

A RFQ is an approach that allows for greater flexibility and the ability to negotiate if the facility is unsure of the scope of the project. The facility can incorporate discussions on the final proposal into the interview process, allowing for greater interaction with the designer. The RFQ process also allows more designers to submit initial bids, since the barriers to submission are lower. The RFQ includes:

- Summary of the entire project scope
- Preliminary design strategy and goals
- General scope of tasks
- Outline of what must be provided in the proposal
- Proposal submission guidelines and standards
- Request for the firm's philosophy
- Standards for the interview process
- Project time-line

Project Pricing

If the health care facility already has a specific dollar value attached to the wayfinding program design process, it is wise to have an RFQ process and ask the designers in the interview stage to provide more details on the specific design services that can be provided for that fee. This also allows for more flexible negotiations with the selected design firm. If the facility is unclear about how much money will be available or the elements needed, it is a good idea to provide a two-part RFP. An initial fixed-fee master plan phase will result in a series of options for the development of a wayfinding program and pricing associated with each option.

Fee Proposal

A fee proposal establishes the payment options as part of the design process. There are a number of approaches that can be taken in defining fee approaches. The most common are:

Rates based on an hourly estimate: Designers can provide a listing of their hourly rate for each stage in the design process along with an estimate of hours for each stage of the process. In this case the facility can negotiate the final project budget with the selected designer.

Fixed price:

The facility can define a fixed price as part of the RFP and ask designers to fit their design process around the fixed price. This is easier to accomplish as part of

a master plan or schematic design process than a full design and implementation program unless the facility is very clear of the scope of work and the number and type of design elements that are to be included.

One Stage or Two?

If the scope of work is unclear in the RFP, a two-stage RFP process with a fixed fee for the master plan and schematic design and a more tentative proposal for the design development and implementation work should be done. The facility can also split the RFP into two distinct projects, allowing for a clear early budget to be developed and a later budget to be created based on the master plan and schematic design. This allows the facility to more freely develop a program and get a full understanding of design and implementation costs. It is unethical to require the designer to develop schematic design documents without a fee in the proposal process.

The Interview

In the RFP process most facilities select the top two to three design firms for final interviews. Since the proposal and pricing has already been provided the interview can focus on specific details of the proposals along with the qualifications of the firm.

In the RFQ process the interview of top firms is more extensive with discussion about issues related to the project scope. With RFQs, transparency of the interview process is crucial to success. A teleconference call with the selected firms can provide the clarity needed for

firms to submit proposals closely aligned with the goals of the institutions, while also discussing issues in an open dialogue.

Sample Request for Proposal (RFP)

The following is a Sample Request for Proposals (RFP). All RFP's should include: The Facility Name, Contents, Project Description, Scope of Services, Uniform Proposal Outline, Proposal Submission, Project Schedule, Fee Schedule and Project Mission Statement.

Overall Project Description

[name of the facility] is a multi-building campus at the edge of a downtown area. The hospital serves mainly patients from the city and has extensive emergency and clinical services to support the population. [name of the facility] is expanding with a new pavilion to support clinical and research services that reach the overall region and the nation.

The Facility

[name of the facility] is undergoing a new 300,000 square foot expansion to its main 900,000 square foot building. The entire facility will also be renovated and a new wayfinding system incorporated into the main building. The expansion will be a separate pavilion sharing the same main lobby space.

Wayfinding Strategy

[name of the facility] wants to develop a wayfinding system that will reach both its current multi-lingual population and also project an updated image for an expanding regional and national customer base. The Hospital is seeking:

- A consistent wayfinding system for the entire campus
- A system that is built around the central information hub of the main building
- A system that will be easy to update and change based on expansion
- A system that will incorporate universal symbols for healthcare

The Proposed Wayfinding System

[name of the facility] proposes a new wayfinding system for both the expanded facility and the existing main building. The system will include the following attributes:

- An outdoor wayfinding program for all roads inside the hospital campus
- New building identity signs

- A new interior wayfinding system including wayfinding and identification signs for both the new campus and existing building
- Print and map support
- Potential digital support through the web or on-site kiosk based on the needs of the system.

Scope of Services

[name of the facility] is seeking interior and exterior wayfinding consulting services for the building expansion. Your proposal should include, but not necessarily be limited to, the following Scopes of Work:

- Master Plan and Schematic Design Phase
- Develop a wayfinding master plan including
- Expanded wayfinding strategy including non-sign elements like digital wayfinding, public art, landmarks, and donor recognition, if pertinent to the success of the project.
- Recommendations for incorporating universal symbols
- Recommendations for updating of existing sign program
- Preliminary destination criteria
- Stakeholder plan for ongoing approvals and implementation
- Vehicular site circulation and pedestrian site circulation

Prepare schematic design concepts for wayfinding graphics that are to include the following elements:

- Directional signs for both the exterior and interior
- Building identifiers
- Main hospital identification signs
- Additional wayfinding elements including landmarks and public art if included in the recommendations
- Kiosks and other digital sign elements if included in the recommendations
- Prepare a budget for wayfinding graphics based on the approved schematic design concept.
- Prepare a set of recommendations for web and print graphics

Design Development and Documentation

Prepare design development documentation necessary for the wayfinding elements to convey scope and intent. Emphasis should be placed on the coordination of the signage design with the interior design consultant, as well

as coordination with the architectural design.

- Prepare documentation that meets state and local ADA guidelines in the building code as well as the fire code.
- Final destination criteria and list of destinations.
- Update the budget for wayfinding elements based on the design development Documents.
- Develop a technology and print graphic review
- Prepare construction intent documents for the wayfinding elements based on the approved design development documents. These construction intent documents must be at the level where they can be publicly bid.
- Maintain the confirmed design development budget throughout construction intent phase.

Approvals and Implementation

- Presentations of the design concepts to the [name of the facility] staff will be required during schematic design, design development, and construction intent phases of the project.
- Provide compliance with all applicable municipal, state and national regulatory agency ordinances, codes and requirements.
- Provide assistance to gain any special permits or approvals that may be required, including but not limited to building permits and certificates of occupancy.
- Issue the signage and graphics construction documents for subcontractor bidding and provide bidding, negotiation, and construction administration services.
- Provide services necessary for the proper procurement and installation of the design elements by the contractor and its suppliers.
- Provide services necessary to assure complete coordination of this scope of work with Architect and other consultants as required. Attend project design and coordination meetings with the design teams as necessary to implement this activity. Update documents with any background or sheet changes, including signage type and location changes from architectural edits, during the various stages of design.

Design Guidelines

Prepare final design guidelines including as-built documentation and material specifications. Design guidelines should also include:

- Templates for print graphics
- Templates for all symbols
- Final as-built design drawings
- Sample bid documentation
- Wayfinding strategy and summary of all design elements
- Recommendations for ongoing expansion

Proposal Outline for Submission

Prepare a proposal that is responsive to the Scope of Work in this RFP and that includes the following minimum information per the sections described below. Organize the required information in a logical manner that facilitates the owner's ability to evaluate your response.

Project Team

- Identify design firm philosophy.
- Identify the key individuals in the firm who will be assigned to the project. Include a proposed organization chart and clearly define the role of all key individuals.
- Provide resumes for key individuals. Resumes should specifically address relevant project experience and provide sufficient information to allow the owner to clearly assess the individual's qualifications and experience. Furthermore, the percentage of time the key individual will be dedicated to each project shall be stated as well as the name and scope of other projects this individual will be supporting.
- Indicate any additional resources that may be available to assist the key individuals in the fulfillment of this project. Provide a brief description of resource's qualifications and experience.
- Identify any outside sub consultants that you plan to engage in order to provide the scope of work requested. Provide resumes for key sub consultant staff.

Similar Project Experience

- Identify three (3) recent hospital projects similar in size and complexity to the proposed projects in which your firm has provided design and planning services. The selected projects should demonstrate market driven solutions, customer oriented care and measured value added. The following information is required on each project: (Limit: One [1] page per project)

Sample Request for Qualifications (RFQ)

- Owner name
- Project description (identify major elements and/or unique features and service provided)
- Project size (SF/# of Beds)
- Key personnel from your firm involved in the project.
- Client/Architect/contractor reference (name, position, address, and telephone number).

Suits and Claims

Describe all instances of project disputes that, in the last five years, reached the level of (1) formal mediation, arbitration, or litigation; or (2) significant settlements with clients, contractors, or sub-contractors. Also describe any known claims or suits that may be pending.

Fee Proposal

Fee proposals must reflect the specific scope of work in the master plan and schematic design phase. A tentative fee proposal can be established for design development, implementation, and guidelines phases. Recommendations for additional design elements including the web, electronic elements, and public art elements can be negotiated separately.

- Fee proposals shall reflect the executing of the Consultant Agreement attached.
- Fee proposals shall be a stipulated lump sum fee for the master plan and schematic design phases and an estimated fee for the design development, implementation, and guidelines phases.
- Fee proposals shall clearly indicate what if any expenses are reimbursable and provide a budget estimate for expected reimbursable expenses.
- Reimbursement for expenses will not exceed this budget estimate without Owner's prior written authorization.
- Fee proposal shall clearly state the Consultant's proposed terms of engagement for the project. Any proposed terms shall comply with the insurance requirements described elsewhere in the RFP.

Proposal Submission

General Information

The evaluation of proposals will be conducted in the following manner:

- All proposals received will be reviewed in detail and

evaluated based upon the information provided.

- The Owner will make the final selection.
- [name of the facility] reserves the right to reject any or all proposals and to waive any formality or informality in proposals received.
- All materials submitted shall become the property of [name of the facility] and will not be returned. The owner agrees to treat these materials as confidential and only to be used for the purposes of selecting a medical communications planner for this project.
- It is understood and agreed by the submitting firms that submittals, interviews, etc., are voluntary and [name of the facility] and/or its employees, agents, etc., are not responsible for any compensation and/or other commitments associated with submittals or interviews.

Submittal Information

Calendar of Events

Release of RFP: Date

Proposal deadline: Date and Time

Follow up interviews may be required. Details will be provided if follow up interviews are requested.

Final selection: Date

Beginning of project negotiations: Date

The following is a Sample Request for Qualifications (RFQ). All RFQ's should include: The Facility Name, Contents, Project Description, Scope of Services, Uniform Proposal Outline, Proposal Submission, Project Schedule, Fee Schedule and Project Mission Statement.

[name of the facility], RFQ Contents; Project Description; Preliminary Scope of Work; Uniform Proposal Outline; Proposal Submission; Project Schedule; Project Mission Statement.

Description

[name of the facility] is a multi-building campus at the edge of a downtown area. The hospital serves mainly patients from the city and has extensive emergency and clinical services to support the population. [name of the facility] is expanding with a new pavilion to support clinical and research services that reach the overall region and the nation.

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- A system that will be easy to update and change based on expansion
- A system that will incorporate universal symbols for health care

The Proposed Wayfinding System

[name of the facility] proposes a new wayfinding system for both the expanded facility and the existing main building. The system will include:

- An outdoor wayfinding program for all roads inside the hospital campus
- New building identity signs
- A new interior wayfinding system including wayfinding and identification signs for both the new campus and existing building
- Print and map support
- Potential digital support through the web or on-site kiosk based on the needs of the system

Preliminary Scope of Services

[name of the facility] is seeking interior and exterior wayfinding design services for the building expansion. The responsibilities of the design firm include:

Master Plan and Schematic Design Phase

In this phase the design firm is expected to develop a sign master plan and schematic design consisting of, but not limited to the following components:

- Overall wayfinding strategy including non-sign elements like digital wayfinding, public art, landmarks, and donor recognition, if pertinent to the success of the project.
- Recommendation for incorporating universal symbols
- Recommendations for updating of existing sign program
- Preliminary destination criteria
- Plan for ongoing approvals and implementation
- Vehicular site circulation and pedestrian site circulation
- Schematic design concepts for all the elements outlined in the master plan
- A budget for wayfinding graphics based on the approved schematic design concept
- A set of recommendations for web and print graphics

Design Development and Documentation

- Develop design documentation for all signs
- Final destination criteria and list of destinations
- Develop a technology and print graphic review as recommended in the master plan
- Prepare construction intent documents for the

wayfinding elements based on the approved design development documents

Approvals and Implementation

Approvals of the design concepts by the Hospital staff will be required during schematic design, design development, and construction intent phases of the project.

- Issue the construction intent documents for subcontractor bidding and provide bidding, negotiation and construction administration services.
- Provide services necessary for the proper procurement and installation of the design elements by the contractor and its suppliers.
- Collaborate with other designers including the architect and interior designers working on the hospital expansion.

Design Guidelines

Prepare final design guidelines including as-built documentation and material specifications.

Proposal Outline for Submission

Prepare a proposal that outlines your qualifications to meet the scope of work provided in this RFQ including the minimum information described below. Organize the required information in a logical manner that facilitates the owner's ability to evaluate your response.

Project Team

- Identify design firm philosophy.
- Identify the key individuals in the firm who will be assigned to the project. Include a proposed organization chart and clearly define the role of all key individuals.
- Provide resumes for key individuals proposed. Resumes should specifically address relevant project experience and provide sufficient information to allow the owner to clearly assess the individual's qualifications and experience.
- Indicate any additional resources that may be available to assist the key individuals in the fulfillment of this project. Provide a brief description of the resource's qualifications and experience.
- Identify any outside sub-consultants that you plan to engage in order to provide the scope of services requested. Provide resumes for key sub-consultant staff.

Similar Project Experience

Identify three (3) recent Hospital projects similar in size and complexity to the proposed projects in which your firm has provided design and planning services. (Limit: One [1] page per project)

- Owner Name
- Project description (identify major elements, and/or unique features and service provided)
- Project size (SF/# of Beds)
- Key personnel from your Firm involve in the project.
- Client/Architect/contractor reference (name, position, address, and telephone number).

Firm Design Philosophy

A firm design philosophy statement including design approach, project priorities and metrics for project success. (Limit: [1] page)

Proposal Submission

General Information

- The evaluation of proposals will be conducted in the following manner:
- All proposals received will be reviewed in detail and evaluated based upon the information provided.
- The Owner will make the final selection.
- [name of the facility] reserves the right to reject any or all proposals and to waive any formality or informality in proposals received.
- All materials submitted shall become the property of [name of the facility] and will not be returned. The owner agrees to treat these materials as confidential and only to be used for the purposes of selecting a medical communications planner for this project.
- It is understood and agreed by the submitting firms that submittals, interviews, etc., are voluntary and [name of the facility] and/or its employees, agents, etc., are not responsible for any compensation and/or other commitments associated with submittals or interviews.

Short-list Teleconference

A teleconference of selected firms will be held on Day/Date. Preliminary questions by the firms will be submitted in writing on the day before the teleconference.

Additional questions can be asked at the teleconference after the written questions are answered. A recording of the teleconference will be made available to attendees 24 hours after completion.

Interview Requirements

When attending the interview the short-listed firms will provide the following information for review:

- An in-depth proposal for the master plan and schematic design phases of the project including specific fees.
- A preliminary scope of work for the design development and implementation stages of the project based on the firm design philosophy and approach. If outside firms are recommended to be included in this stage, this can also be presented.

Interviews will be no more than one hour in length and be attended by no more than three firm principals.

Submittal Information

- Calendar of Events
- Release of RFP: Date
- Proposal deadline: Date and Time
- Teleconference with short-listed firms: Date
- Firm interviews: Date
- Final selection: Date
- Beginning of project negotiations: Date