ProjectManagement

RFI Best Practices

Tips from a Project Manager

PROCORE | ConstructionOS

Looking back to ancient architecture, its unlikely that the people who built Stonehenge stopped to chisel out a question, send it to the owner, pass it on to the architect and then wait for a response. While we can't determine how it really happened, it seems doubtful that this type of process was in place. More likely, there could have been some builders standing around, probably telling a couple inappropriate jokes, and then they started talking about how to stack rocks. So how has this process changed?

LOOKING ON THE TIMELINE OF BUILDING HISTORY, DOCUMENTING QUESTIONS FOR LIABILITY PURPOSES IS PROBABLY A RELATIVELY NEW INVENTION, BUT IT MAKES SENSE.

Contracts, building departments, OSHPD, DSA, FDA, licensing, and every other regulatory and liability reason, creates a need for thorough documentation. Both the increased likelihood of a lawsuit, and the potential cost has rightfully mandated stricter management practices. Alas, efficiency suffered at the hand of mitigating risk.

Wouldn't it be nice if every project facilitated a big room, architects onsite, and other dedicated resources to resolve problems? Unfortunately, this is hardly ever the case in our society, although historically, it has worked efficiently. Despite technological developments including cell phones, emails, and text messages, talking face to face when possible is the most efficient way to solve problems. While these other methods are more accessible, many elements of communication are lost or misunderstood in the process.

The trouble with our society seems to have something to do with balancing efficiency and risk. Our goal should be to gain efficiency while mitigating risk.

Here are some thoughts on efficiency for RFIs today and thoughts on how we can improve our process to handle RFIs more efficiently while mitigating risk in the future.

These types of vague and uninformative RFIs are not helpful to anyone. Yet, as an owner's representative, questions like this still come up all of the time.

THE FOLLOWING TIPS WILL HELP YOU WRITE EFFECTIVE RFIS

EXAMPLE 1

"Detail 16 on sheet A9.3 does not work"

EXAMPLE 2

"Explain RFI-0034"

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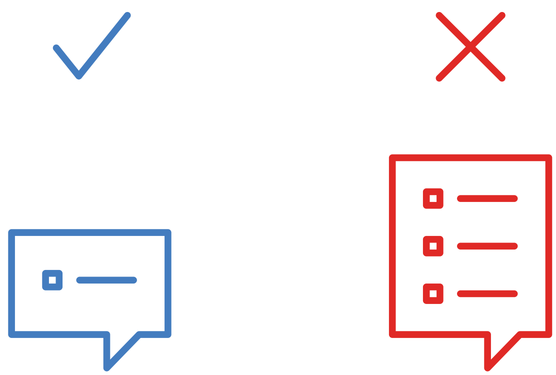
I. Be Sure to Ask a Question

While it seems self-evident, contractors send requests for information without question marks.

IN ORDER TO REQUEST INFORMATION, THERE MUST BE A QUESTION.

It’s very important to give the architect something specific to respond to.

In order to efficiently process and respond to RFIs, each must contain only one specific question. RFIs shouldn’t be loaded up with 30 different questions. Multiple questions and mixing issues in an RFI create confusion and delays in response time.



II. Provide Context to the Issue

Providing context to the single question has been the most influential factor in obtaining a good response.

Routinely, I receive questions that make perfect sense to ONLY those who have heard a conversation onsite. The question must be asked so that anyone can understand the issue.

GETTING AN RFI BACK THAT CREATES ANOTHER RFI IS PAINFUL AND HORRIBLY INEFFICIENT.

What is the conflict?	Where is the problem?
Who is impacted?	Which sheet/details?
What is impacted?	When do you need it?

III. Provide Drawings, Sketches, Pictures or Video

A picture is worth a 1000 words, except in an RFI where it's probably worth more.

MEDIA IS TREMENDOUSLY HELPFUL IN PART TO GIVE CONTEXT BUT ALSO TO SPEED UP THE UNDERSTANDING OF THE ISSUE.

The odds are, if you're in this business you probably have good spatial skills and a picture makes it easy to understand. However, even with a beautiful picture, RFIs still need an explanation and a single point of focus.

IV. Provide a Suggested Solution

Architects spend 6 years in college because they love design.

As a GC, you are the building expert. Direct the design team in a direction that will work best for the project.

So far we've focused on the questions because with a good question, answers are much easier to come by. Architects however, are not off the hook. Good answers have a simple formula; they answer the question. Easy right?

A good answer should include:

1. NO QUESTIONS

When an RFI comes in from an architect with questions in the response, it is commonly sent back.

Under no circumstances should architects answer questions with questions. If you need more information, do the research prior to responding.

2. A RECOMMENDATION INSTEAD OF OPTIONS

In some situations, multiple options may be acceptable to the design team. However, when the response comes back as "either option is acceptable" it doesn't help the documentation process. By providing a recommendation, you keep everyone moving in the same direction without any surprises.

3. A COMPLETE ANSWER TO THE QUESTION

Answer the complete question so that the team knows what to do. This ensures that no remaining issues stall the project.

GOOD QUESTIONS AND GOOD ANSWERS SPEED UP THE PROCESS OF GETTING INFORMATION BACK TO THE PEOPLE ACTUALLY DOING THE WORK. THIS IS WHAT PROJECT MANAGERS WANT.

RFIs requiring additional RFIs (or more questions to be answered) are wastes of time.

For example, our healthcare facility has a rigid workflow process for RFIs. GCs send RFIs to the owner, and then they are reviewed and sent on to the architect and design team.

After the RFI is answered it follows the same process in reverse. This process was modeled after a paper construction world and there are pro's and con's to the methodology. One of the good things about this process is that everyone has buy in, but the downside is that it can be inefficient.

WHAT IF THERE WAS A WAY TO LEVERAGE CURRENT TECHNOLOGY TO PROVIDE A SPACE WHERE MULTIPLE INDIVIDUALS COULD VIRTUALLY DISCUSS THE ISSUE, ASK QUESTIONS AND PROVIDE AN OFFICIAL ANSWER?

Without the ties to a paper construction world, we can rethink the RFI process. For all of the reasons we listed above, we must document the question, the answer, and in our case, the owners approval as well.

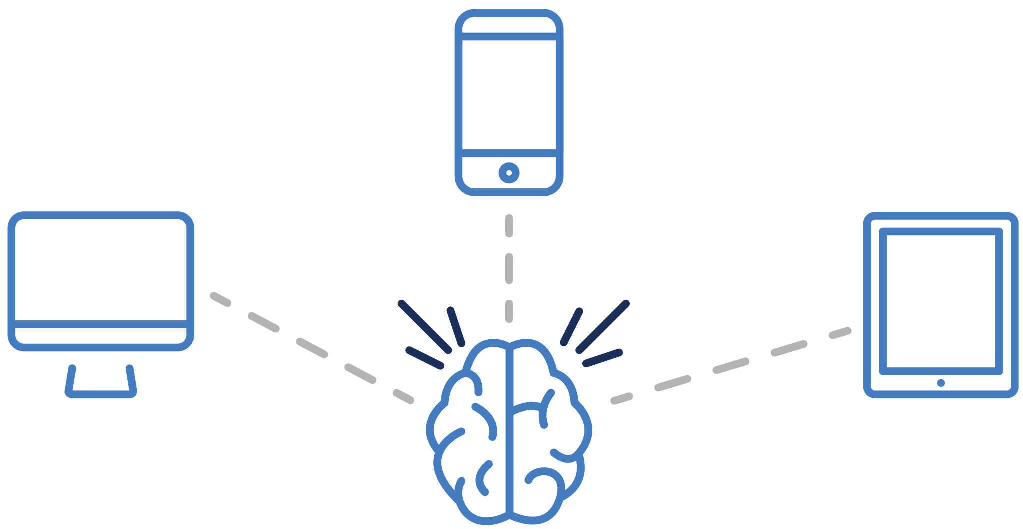
The RFI process actually seems closer to a blog post than a letter sent in the mail. What if we had a specific online project community with a forum that allowed members of the project team to ask questions, respond, endorse, and solve problem similar to how we did many years ago, face-to-face.

V. Conclusion

Economic and social factors are requiring the construction industry to leverage emergent social software platforms to increase efficiency.

WE CANNOT CONTINUE TO AFFORD HAVING OUR ELECTRONIC PROCESSES MIMIC THE PAPER WORLD.

No matter what software platform we use, better questions lead to better answers. We need to focus on leveraging smarter technology alongside better practice to facilitate quicker answers for increased efficiency.



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