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Choosing the Right Tool: When to Use a Request for Qualifications (RFQ) for Infrastructure Procurement

Date of Last Revision: 6/22/26

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WHAT WILL YOU LEARN FROM THIS QUICK READ?

- What a Request for Qualifications (RFQ) is and how it works
- How RFQs differ from Requests for Proposals (RFPs) and Invitations for Bids (IFBs)
- When RFQs are most effective for infrastructure projects

The Basics of an RFQ

Most public infrastructure is not built directly by government staff, but delivered in partnership with private engineering firms, construction companies, and other specialized vendors and contractors. These firms and contractors must be selected in accordance with applicable local, state, and federal procurement laws. While smaller projects may sometimes be awarded through more informal processes, most infrastructure projects are complex, high-cost, and require a structured, competitive solicitation process.

Governments use a range of formal procurement tools to facilitate competitive solicitation processes. While Requests for Proposals (RFPs) and Invitation for Bids (IFBs) are widely used, RFQs also play a particularly important role in infrastructure procurement—especially for professional services and complex projects. RFQs are not appropriate in every situation—and in some cases, their use is required (or limited) by law—but they can be a powerful tool for infrastructure procurement when used in the right context.

An RFQ focuses on first identifying the most qualified firm or firms (such as a consultant, engineer, architect, project manager, etc.), rather than selecting based on price or project approach during the initial selection process.¹ Firms are asked to demonstrate their experience delivering similar infrastructure projects and document their technical expertise and capacity to perform the work. Once the most qualified firms are selected, the government then negotiates or competes with the exact scope and price directly with the firm.

By comparison, an RFP is typically used when a government wants firms to propose and compare different technical approaches, implementation strategies, or solutions to a defined problem. RFPs often include a valuation of both technical proposals and cost. An IFB selects a firm primarily based on the lowest price for a fixed scope of work.

Running an RFQ Well

Running an RFQ well requires more than asking for qualifications. In addition to utilizing PPG's RFQ template as a guide, here are a few key principles to keep at the forefront:

-  **First, design the RFQ around the objective you are trying to achieve.** Whether selecting a single firm, creating a bench of prequalified contractors, or shortlisting firms for a later competition, tailor the solicitation, evaluation criteria and process, and interviews to identify the firms best positioned to help the government achieve its goals.

¹ For simplicity, this document generally uses the term 'firm' to refer broadly to consultants, contractors, engineering firms, vendors, and other private entities responding to a Request for Qualifications solicitation. We utilize the abbreviation RFQ to help distinguish between a Request for Quotation and a Request for Qualifications.

Running an RFQ Well (cont.)

-  **Second, clearly communicate the procurement process.** Explain the evaluation criteria and weights, whether interviews will occur, when cost information will be requested, and whether the RFQ will result in a direct award, shortlist, or prequalified pool. Clear expectations promote stronger submissions and a more efficient procurement process.
-  **Third, focus the evaluation on qualifications that matter most to project success.** Evaluate firms based on demonstrated competence, relevant experience, capacity, and the qualifications of the proposed team. Design evaluation criteria to be clear, distinct, and non-overlapping, so each criterion measures something meaningfully different.
-  **Fourth, right-size the submission requirements.** Request only the information needed to fairly compare qualifications and make a sound selection decision. Avoid requesting or evaluating information that is unlikely to distinguish between firms or inform the selection decision. Excessive submission and qualification requirements can increase costs, discourage participation, and unnecessarily limit competition. Streamlined RFQs allow evaluators to focus on the factors that matter most while making it easier for qualified firms to compete.
-  **Fifth, use interviews strategically.** For complex, high-risk, or relationship-driven work, interviews can provide valuable insight into a firm's project understanding, communication skills, and ability to work effectively with government staff and stakeholders.

Throughout, document evaluator feedback, scoring, discussions, negotiations, and final selection decisions. These practices promote transparency, strengthen defensibility, and help governments identify the firms best positioned to deliver successful outcomes.

When to Use an RFQ: Five Common Scenarios

While not exhaustive, the following list outlines five common scenarios when an RFQ is especially well-suited for infrastructure procurement. The scenarios below move from situations where the use of an RFQ is legally required or strongly driven by project characteristics to situations where governments have greater discretion to use an RFQ as a strategic procurement tool.

1. When Required by Law

Before selecting a project delivery methodology or procurement approach, governments must first assess their regulatory context to understand what is required by law. Governments should review local, state, and federal laws to understand how requirements are layered and interact.

Start at the local level. Review local ordinances, charters, and procurement policies to determine when an RFQ is required by law—and when it may be restricted or prohibited.

Next, review state law. 46 U.S. states have adopted statutes or equivalent policies that often require the use of RFQs when procuring professional services from architects, engineers, and surveyors (A&E). These laws vary significantly in scope, and in their applicability to local governments.² Conversely, there are circumstances in which RFQs are not permitted for procurement.

Finally, assess federal requirements, particularly when projects involve federal funding. Uniform Guidance generally permits, but does not universally require, qualifications-based procurement methods such as RFQs for architectural and engineering (A/E) services. Specifically, [2 CFR 200.320](#) permits qualifications-based procurement for A/E services. In most cases, federal rules under 2 CFR 200 allow flexibility in how you procure services, including whether to use RFQs, though additional requirements may apply depending on the applicable federal funding source or program. For example, some transportation projects funded through the Federal Highway Administration (FHWA) and governed by [23 CFR Part 172](#) must use qualifications-based selection procedures for A/E services. These procurements are commonly conducted through RFQs. Similarly, transit projects receiving Federal Transit Administration (FTA) funding are subject to similar requirements for services associated with construction projects (49 U.S.C. § 5325 and FTA Third-Party Contracting Guidance (Circular 4220.1G, formerly 4220.1F)). In these cases, firms must be selected based on qualifications, with price negotiated only after the most qualified firm is identified. Governments should review any agency-specific procurement rules tied to the applicable funding source or program, as additional qualifications-based selection requirements may apply in sectors such as aviation, water infrastructure, housing, or emergency management.

Managing Different Requirements

When requirements differ across jurisdictions, governments must follow the **most specific requirements**. In practice, this means:

- If one level of law (e.g., federal) requires the use of an RFQ, while another (e.g., municipal law) allows price-based selection, the agency must use an RFQ.
- If any applicable law prohibits a method (e.g., RFQs for certain services), that prohibition governs—even if other jurisdictions would allow it.
- In other words, agencies must comply with **all applicable legal, regulatory, and funding requirements simultaneously**, defaulting to the rule that imposes the greatest constraint or highest standard.

In sum, legal requirements play a decisive role in determining when an RFQ is appropriate—and when it is not. By reviewing local, state, and federal laws, funding requirements, and program guidance together in sequence and applying the most specific applicable standard, agencies can reduce legal risk, promote fair competition, and ensure they select the right partners for the project.

² Several states clearly require RFQs for most A&E procurements, and in some cases explicitly extend that requirement to political subdivisions or local governments. For example, in North Carolina ([§ 143-64.31](#)), state law requires political sub-divisions to select A&E firms based on qualifications and demonstrated competence, without regard to proposed fees or unit prices. Only after selecting the most qualified firm may the government negotiate a fair and reasonable fee. Similar RFQ requirements exist in Texas ([§ 2254.004](#)), Washington ([§ 39.80.030](#)), Nebraska ([§ 81-1715](#)), and Florida ([§ 287.055](#)).

2. When the Project Scope is Prescribed and the Cost is Fixed

In some cases, a government may be advancing a project with a prescribed scope of work and a fixed or tightly constrained budget. This often occurs when project parameters and funding are tightly defined by regulatory, grant, or program requirements. When the scope is well-defined, there may be limited value in asking firms to submit substantially different technical approaches. And, where budgets are fixed or pricing flexibility is limited, cost proposals may provide little meaningful distinction between firms. In these situations, the most important procurement question is often not, “What solution should we choose?” but rather, “Which firm is best qualified to deliver this work successfully?” In these situations, particularly for professional or technical services, an RFQ is a practical choice.

An RFQ allows governments to focus on the evaluation of factors such as relevant experience, technical expertise, past performance, team qualifications, and organizational capacity. Rather than requiring firms to propose detailed proposals, the RFQ process emphasizes which firms are best equipped to successfully deliver the project as defined.

Depending on the procurement structure, the government can then either shortlist firms for a subsequent proposal phase or proceed to negotiate final terms—such as scope refinements, schedule, and pricing—within the established project constraints.

This approach helps ensure that projects are delivered by capable and experienced teams, while avoiding unnecessary effort for both firms and staff. It also reinforces a core principle of infrastructure procurement: when key project variables are already set and price competition is constrained, selecting the right partner can be as important as comparing detailed approaches or costs.

→ Example: Charlotte’s SS4A Project RFQ with a Fixed Scope of Work and Budget

The Charlotte Regional Transportation Planning Organization (CRTPO) provides a clear example of how an RFQ can be used when project parameters are already well established. In its [Safety Action Plan RFQ](#), CRTPO outlines a defined scope of work, including specific planning tasks, stakeholder engagement requirements, and deliverables. Because the solicitation identifies a defined set of planning and deliverable requirements tied to federal funding with established budget constraints, there is limited need for contractors to propose fundamentally different approaches. This approach allows CRTPO to focus heavily on consultant qualifications and relevant experience, while still allowing firms to bring forward strong safety strategies within the project framework. This approach is also consistent with common federal and state requirements to select engineering and planning services based on qualifications rather than price. The RFQ focuses on evaluating firms based on their past performance on similar projects and demonstrated experience in transportation safety planning, data analysis, and community engagement.

3. When there are Ongoing Infrastructure Needs Requiring a Bench of Prequalified Contractors

Local governments often face recurring infrastructure needs—such as sidewalk repairs, water line replacements, stormwater improvements, or facility maintenance—but may not know exactly when or where work will be required. In these cases, an RFQ can be used to prequalify a pool of contractors, consultants, engineering firms, or other service providers in advance. This approach allows governments to establish a “bench” of qualified firms and move quickly when needs arise.

As discussed in our quick read, [Optimizing Pre-Qualification Approaches for Fairness, Speed, and Results](#), a bench is a procurement strategy that allows governments to identify qualified firms before specific projects are known. Benches can be implemented through a variety of contracting structures depending on the type of services being procured, applicable legal requirements, and agency needs. Common examples include Indefinite Delivery/Indefinite Quantity (IDIQ) contracts for professional or technical services and Job Order Contracting (JOC), a construction-oriented form of IDIQ commonly used for repair, maintenance, and small capital projects.

Indefinite Delivery and Indefinite Quantity (IDIQ) Contracts

IDIQ contracts enable governments to procure an indefinite quantity of professional services, technical services, or project work over a fixed period, issuing work through task orders as needs emerge.

This model is particularly useful for recurring or unpredictable needs—such as engineering services, on-call design support, or small- to mid-sized infrastructure projects—where speed and flexibility are critical. IDIQs can be structured as single-award or multi-award contracts, with task orders competitively awarded or assigned to firms based on predefined criteria.

When implemented effectively, IDIQs help governments streamline procurement, reduce administrative burden, and accelerate project delivery, while still maintaining competition and compliance through clear task order procedures and contract limits.

Job Order Contracting (JOC)

Job order contracting (JOC) is a specialized type of IDIQ, commonly used for construction, repair, renovation, and maintenance work. Under a JOC, governments award contracts to one or more prequalified contractors and then issue discrete job orders for individual projects over time. Like other on-call models, JOCs are typically governed by specific rules regarding when they can be used and how contractors within the pool are rotated for each assignment.

→ Example: Mesa's Pool Construction RFQ for Job Order Contracting

The City of Mesa, Arizona provides a clear example of how an RFQ can be used to establish a bench of contractors for ongoing needs. In its [Job Order Contracting \(JOC\) RFQ](#) for pool and water feature construction services, Mesa seeks to prequalify up to three contractors to support a wide range of maintenance, repair, and capital improvement projects over time. Rather than procuring each project individually, the City uses the RFQ to create a pool of qualified and contracted firms. Work is then issued as discrete job orders as needs arise. This approach allows Mesa to efficiently deliver both minor and major construction projects, each with varying scope and timeline, while relying on a competitively selected group of contractors with demonstrated capability. By establishing this bench in advance, the City can respond more quickly to infrastructure needs while maintaining consistency, quality, and oversight across projects.

4. To Reduce Proposer Effort and Improve Proposal Quality

Developing a full response to an infrastructure RFP can be a time-consuming and resource-intensive process for firms, especially when detailed scopes, designs, or phasing plans are required upfront. It can also place a significant burden on government staff, who must review and evaluate complex proposals before making an award. This challenge is particularly acute for large, complex projects.

In these cases, a two-step procurement process can be effective. In step one, the government issues an RFQ and evaluates prospective firms based on their qualifications. The government shortlists a small group of firms—typically three to five highly qualified teams. In step two, only those shortlisted firms are invited to submit more detailed proposals in response to an RFP or IFB.

This approach streamlines the initial phase by focusing only on qualifications, lowering the barrier to entry and encouraging broader participation. It also allows governments to compare firms based on relevant experience rather than lengthy, resource-intensive proposals. At the same time, it preserves the opportunity to evaluate more detailed project approaches and pricing later in the process.

→ Example: Texas Department of Transportation's Two-Step Design-Build Procurement for the Grand Parkway

The Texas Department of Transportation (TxDOT) provides a clear example of how a two-step procurement process can be used to efficiently deliver large-scale infrastructure projects. To construct segments of the Grand Parkway (State Highway 99), TxDOT utilized a design-build procurement approach structured around an initial [Request for Qualifications \(RFQ\)](#) followed by a [Request for Proposals \(RFP\)](#).

In the first step, TxDOT issued an RFQ focused on evaluating experience with similar highway projects, technical expertise, and team composition. TxDOT invited firms to apply, evaluated responses, and shortlisted a limited number of the most qualified teams to advance to the next phase.

In the second step, only those shortlisted teams were invited to respond to a detailed RFP. This phase required firms to submit comprehensive technical proposals outlining their project approach, design solutions, construction phasing, and risk management strategies, along with pricing information. By limiting the RFP phase to a small group of highly qualified teams, TxDOT was able to focus its evaluation on high-quality, competitive proposals while reducing the burden on both proposers and agency staff.

This two-step approach allowed TxDOT to balance efficiency and rigor—encouraging broad participation in the qualifications phase while ensuring that detailed proposals were only developed by the most capable teams. It also enabled the agency to select a contractor based on both demonstrated qualifications and a well-developed, project-specific approach, making it particularly well suited for complex, high-value infrastructure projects like the Grand Parkway.

5. When Procuring Services for Early Stage or Undefined Projects

Governments sometimes need professional services before they are ready to procure the full design, construction, or implementation of an infrastructure project. For instance, a city may know that a site needs redevelopment, that a corridor experiences recurring congestion, or that a neighborhood faces repeated flooding. However, before procuring design or construction services, the city may need assistance to evaluate existing conditions, assess alternatives, conduct feasibility studies, advance preliminary engineering, or recommend a preferred course of action. In these situations, the government may be able to define the initial planning or assessment assignment even though the ultimate project remains uncertain. The key question is not which firm has proposed the best solution or approach, but which firm has the experience and expertise needed to perform the defined scope and help the government make informed decisions about next steps. An RFQ can be particularly effective in this context because it allows the government to focus on qualifications, relevant experience, technical expertise, past performance, and the firm's ability to carry out the defined planning or assessment work.

Using an RFQ at this stage does not mean the initial engagement should be vague or open-ended. Even when the ultimate project is not yet defined, the government should establish a reasonably clear scope of services, expected deliverables, budget parameters, and decision points for the planning or assessment phase. Doing so helps reduce the risk of scope creep, cost escalation, and misaligned expectations while preserving the flexibility needed to investigate uncertain conditions.

For early-stage projects characterized by uncertainty, the choice between an RFP and RFQ often depends on what the government is seeking to procure. If the government is ready to evaluate competing solutions or approaches, an RFP may be appropriate. If the government needs professional expertise to conduct a discrete planning, assessment, feasibility, or preliminary engineering effort, an RFQ may provide the more effective procurement approach.

→ Example: Sammamish's Concept Planning RFQ for Major Corridor Improvements

The City of Sammamish, Washington provides a strong example of how an RFQ can be used when a problem is clearly defined but the appropriate solution is not yet fully developed. In its [RFQ for Sahalee Way Improvements](#), the City identifies key transportation and safety challenges along a major corridor but does not prescribe a specific design solution. Instead, the selected consultant is tasked with conducting preliminary engineering, environmental review, and public engagement to help shape the project and advance it through early design phases. This approach is also consistent with Washington's broader statutory framework for procuring architectural and engineering services through qualifications-based selection.

Rather than asking firms to propose fully developed solutions upfront, the RFQ focuses on evaluating qualifications through defined criteria, including relevant experience, team expertise, and project understanding. Once selected, the consultant works collaboratively with the City to refine the scope, evaluate alternatives, and develop a path forward. This approach allows Sammamish to select a highly qualified partner while maintaining a structured and defensible evaluation process for a project that is still evolving.

From Strategy to Implementation: Taking Next Steps

Like any procurement tool, RFQs are most effective when matched to the right project conditions and procurement objectives. Understanding when to use an RFQ is only the first step. Successful infrastructure delivery requires choosing the right approach and using it strategically through a clear and effective process. This guide outlines the scenarios in which governments can use RFQs to accelerate procurement timelines, improve proposal quality, and effectively partner with firms best suited to deliver results.

To make implementation easier, we have developed both an [RFQ template](#), an [RFQ decision tree](#), and quick read on [Optimizing Pre-Qualification Approaches for Fairness, Speed, and Results](#). These tools are intended to help agencies operationalize best practices—providing structure for drafting RFQs and clarity on when to deploy them—so teams can move forward with confidence and consistency.

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The **[Procurement Excellence Network](#)** (PEN) is a free, online community for public sector leaders seeking to transform their jurisdiction's procurement practices. It offers virtual trainings, tools, templates, and coaching, while building peer connections for leaders as they launch efforts to make procurement more strategic, fair, and innovative. PEN is an initiative of **[Partners for Public Good](#)** (PPG), a 501(c)(3) non-profit organization that helps state and local governments use key operational levers—procurement, workforce, digital infrastructure, and budgeting—to drive public impact.

Partners for Public Good is grateful for support from Bloomberg Philanthropies.