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Sample of QBS Templates Filled Out

Project Definition

1.1 Client and Project Information

<i>Name of Client/Organization</i> Ontario Association of Architects		<i>Name of Project</i> Office Building A	
<i>Name of Contact Person</i> John Doe		<i>Project Location</i> Don Mills and Moatfield	<i>Project No.</i> 2006 -106
<i>Contact's Mailing Address</i> 111 Moatfeild Drive		<i>City</i> Toronto	<i>Province</i> ON
<i>City</i> Toronto	<i>Province</i> ON	<i>Postal Code</i> M3B 6L6	<i>E-mail Address of Contact Person</i> Johnd@oaa.on.ca
<i>Telephone Number</i> 416 449-6898		<i>Ext.</i> 309	<i>Fax Number</i> 416 449-5756

1.2 Project Description:

*New 3 Storey Office building, 30,000 sq. ft.
With 6,000 sq. ft. of banquet facilities on the ground floor,*

1.3 Architect Selection Process:

Architect will be selected based upon the QBS process. Client will have seven representatives reviewing submissions, one of which is an outside architect. Final selection will be made by the President and the 4 members of the Executive.

1.4 Pre-design work completed to date (or) required:

Preliminary spatial needs and program has been developed by Planning Architects Inc. and will be available to those firms shortlisted and invited for an interview.

1.5 Timeline of Project:

<i>Start Design Work:</i> September 5, 2006	<i>Start Construction:</i> April, 2007	<i>Planned Occupancy Date:</i> July 15, 2008
-------------------------------------------------------	--------------------------------------------------	--------------------------------------------------------

1.6 Approval Requirements:

Final proposed design will be presented to members of the association for comments and input. A Referendum of the membersahip is required prior to commencement of construction.

1.7 Additional Requirements and /or Conditions:

None

Time Frame for Architect Selection			QBS Template # 2
Page 1 of 2			
<i>Name of Client:</i> Ontario Association of Architects			
<i>Name of Project:</i> Office Building A		<i>Project Reference No.</i> 2006-106	
Target Date	#	Description of Task	Completed
<u>April 15, 2006</u>	2.1	Identify needs and develop scope of work and timeframe for architect selection. <i>(Completion of QBS Templates #1 and #2)</i>	<input checked="" type="checkbox"/>
<u>April 25, 2006</u>	2.2	Issue to invited architects a memorandum or place advertisement requesting "Statement of Interest and Qualifications" from architects. (SOIQ) <i>(Completion of QBS Template #3)</i>	<input checked="" type="checkbox"/>
<u>May 15, 2006</u>	2.3	Deadline for receipt of "Statement of Interest and Qualifications" (SOIQ)	<input checked="" type="checkbox"/>
<u>May 18, 2006</u>	2.4	Review and evaluate "Statement of Interest and Qualifications" submissions.	<input checked="" type="checkbox"/>
<u>May 20, 2006</u>	2.5	Develop short-list architects to be interviewed.	<input checked="" type="checkbox"/>
<u>May 22, 2006</u>	2.6	Establish date of pre-interview tour of site and/or facilities. <i>Tuesday, June 15,,2006</i>	<input type="checkbox"/>
<u>May 30, 2006</u>	2.7	Develop evaluation criteria of "Project Proposals" and interviews. <i>(Review QBS Templates #7 and #8)</i>	<input type="checkbox"/>
<u>June 1, 2006</u>	2.8	Issue memorandum requesting short-listed architects to submit a "Project Proposal" and attend an interview.	<input type="checkbox"/>
<u>June 20,2006</u>	2.9	Deadline for receipt of "Project Proposal".	<input type="checkbox"/>
<u>June 10, 2006</u>	2.10	Issue memorandum to all architects who submitted a "Statement of Interest and Qualifications" who were not short-listed.	<input type="checkbox"/>



Time Frame for Architect Selection

QBS Template # 2

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<u>June 15, 2006</u>	2.11	Conduct Tour(s) of facilities or project site at <u>10:30 a.m.</u> at <u>Don Mills Road and Moatfield Drive.</u>	<input type="checkbox"/>
<u>June 26, 2006</u>	2.12	Hold interviews with short-listed firms, at times and locations previously communicated.	<input type="checkbox"/>
<u>July 15, 2006</u>	2.13	Work with highest-ranked architect to develop and refine the scope of the work.	<input type="checkbox"/>
<u>July 25, 2006</u>	2.14	Request Architect to prepare scope of services and fee proposal contract which is to be submitted to the client for consideration.	<input type="checkbox"/>
<u>August 5, 2006</u>	2.15	Contract is reviewed, negotiated and signed.	<input type="checkbox"/>
<u>August 10, 2006</u>	2.16	Send memorandum to all architects indicating interview results.	<input type="checkbox"/>
<u>Sept. 5, 2006</u>	2.17	Project proceeds.	<input type="checkbox"/>

**Memorandum to request
"Statement of Interest and Qualifications"**

QBS Template #3

Page 1 of 3

To: *Phillip Architect*

From : *Ontario Association of Architects*

Re: Request for Statement of Interest and Qualifications (SOIQ)

Project Name : *Office Building A*

Project No.: *2006-106*

3.1 Invitation

You are invited to submit your "Statement of Interest and Qualifications" to provide architectural services for the above noted project.

3.2 Preliminary Studies Completed

1. Preliminary program requirements are based on studies performed by: *Planning Architects Inc.*
2. Other studies include: *Siting Studies by Planning Architects Inc.*

3.3 Background Information

Attached to this memo are:

1. Project Definition (*QBS Form1*)
2. Timeframe for Architect Selection (*QBS Form2*)

3.4 Contents of "Statement of Interest and Qualifications" (*maximum of 10 pages*)

3.4.1 Practice Information

Name of Practice :

Mailing Address:

Contact person and title:

3.4.2 History of Practice

Provide a brief history of the Practice

3.4.3 Project Team:

Provide a one paragraph biography of key personnel assigned to this project
(*a one page resume for each participant may be appended to the submission*)

3.4.4 Project Experience

Provide examples of past experience of related or similar projects over the past
 three years five years.

3.4.5 Project Management and Cost Control

1. Include examples of project budgeting, cost estimating indicating and results/outcomes.
2. Include the name of the project, the contact person and the estimated/final construction value for the project cited above.

**Memorandum to request
"Statement of Interest and Qualifications".**

QBS Template #3

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3.4.6	<p>References</p> <p>Provide the name and telephone number of three recent references from the projects listed or similar projects.</p>
3.4.9	<p>Practice Methodology</p> <p>Provide a brief concluding statement of how your practice approaches projects with respect to innovation, addressing issues of cost-value, environmental integrity and sustainable design. In your statement indicate why we should select your practice over the others.</p>
3.4.10	<p>Submission Limits</p> <p>You are invited to include additional information to support your qualifications; however the total number of pages for submission requirements is not to exceed <i>10</i> pages (plus resumes). Submissions exceeding this limit will not be considered.</p> <p>Page sizes are limited to</p> <p><input checked="" type="checkbox"/> 8 ½" X 11" (letter)</p> <p><input type="checkbox"/> 8 ½" X14" (legal)</p> <p><input type="checkbox"/> 11" x 17" (oversize)</p>
<p>3.5 Architect Selection Process</p>	
3.5.1	<p>Number to be Selected</p> <p><i>Five</i> architectural practices will be selected for interviews. The selection will be based solely on the review of the "Statement of Interest and Qualifications".</p>
3.5.2	<p>"Project Proposal" Submission</p> <p>Architects selected will be invited to submit a more detailed "Project Proposal" and attend an interview.</p>
3.5.3	<p>Facility/ Project Site Tour</p> <p>Prior to the interview, practices selected to submit a "Project Proposal" will be invited to tour: <input type="checkbox"/> <i>the facility</i> <input checked="" type="checkbox"/> <i>the project site</i>.</p>
3.5.4	<p>Quality Based Selection Process</p> <p>The selection process will be the Quality Based Selection Process (QBS) as recommended by the Ontario Association of Architects and the National Guide to Sustainable Municipal Infrastructure (www.infraguide.ca).</p>
<p>3.6 Submission Deadline and Requirements</p>	
3.6.1	<p>Number of copies required:</p> <p>Please submit <i>six</i> copies of your "Statement of Interest and Qualifications" to the following address before <i>11:00</i> <input checked="" type="checkbox"/> a.m. <input type="checkbox"/> p.m. local time on <i>Tuesday, May 15, 2006</i>.</p>
3.6.2	<p>Late Submissions</p> <p>Late submissions will not be accepted and will be returned unopened.</p>

**Memo requesting
"Statement of Interest and Qualifications".**

QBS Template #3

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3.6.3	<p>Submit "Statement of Interest and Qualifications" to:</p> <p><i>Name of Client/Organization</i> Ontario Association of Architects</p> <p><i>Mailing Address</i> 111 Moatfield Drive</p> <table border="1" data-bbox="298 558 1502 625"> <tr> <td><i>City</i> Toronto</td> <td><i>Province</i> ON</td> <td><i>Postal Code</i> M3B 6B3</td> </tr> </table> <p><i>Name of person/department to receive submission</i> Attn: John Doe</p> <p><i>Reference</i> RE: Office Building A</p>	<i>City</i> Toronto	<i>Province</i> ON	<i>Postal Code</i> M3B 6B3
<i>City</i> Toronto	<i>Province</i> ON	<i>Postal Code</i> M3B 6B3		
3.6.4	<p>Person to contact for additional information</p> <p><i>Name of Contact Person</i> John Doe</p> <table border="1" data-bbox="298 884 1502 951"> <tr> <td><i>Telephone Number</i> 416-449-6898</td> <td><i>Fax Number</i> 416-449-5756</td> </tr> </table> <p><i>E-mail address of contact person</i> Johnd@oaa.on.ca</p>	<i>Telephone Number</i> 416-449-6898	<i>Fax Number</i> 416-449-5756	
<i>Telephone Number</i> 416-449-6898	<i>Fax Number</i> 416-449-5756			
3.6.5	<p>Facsimile or E-mail submissions:</p> <p>1. Facsimile submissions are <input type="checkbox"/> acceptable <input checked="" type="checkbox"/> Not acceptable</p> <p>2. E-mail submissions are <input type="checkbox"/> acceptable <input checked="" type="checkbox"/> Not acceptable</p>			
3.6.6	<p>Additional comments or requirements:</p> <p>None</p>			

**"Statement of Interest and Qualifications"
Scoring Sheet**

QBS Template #4

Page 1 of 1

Name of Project: <i>Office Building A</i>		Date: <i>May 20, 2006</i>			
Name of Practice: <i>Philip Architect</i>		Time: <i>3:30 p.m.</i>			
Name of Reviewer: <i>Mary Williams</i>					
Evaluation Criteria	Score (1-10)	X	Weight (1, 1.5 or 2)	=	Total
4.1 Presentation					
1. All submission requirements provided.	8	x	1	=	8
2. Clarity and organization of material.	6	x	1	=	6
4.2 Qualifications (Based on resumes for assigned staff and consultants.)					
1. Assigned staff - education, professional qualifications, professional development.	10	x	1.5	=	15
2. Consultants - education, professional qualifications, professional development.	7	x	1.5	=	10.5
4.3 Experience (Based on the list of similar projects provided with the submission completed in last (5) years.)					
1. Number of projects of a similar type; or	7	x	2	=	14
2. Number of projects of similar scale/complexity; or	8	x	1.5	=	12
3. Number of projects with similar professional services	3	x	1	=	3
4.4 References (Based on client references provided with the submission.)					
Reference No.1 <i>Mars Office Building</i>	10	x	1.5	=	15
Reference No.2 <i>London Office</i>	8	x	1.5	=	12
Reference No.3 <i>Engineer Office</i>	8	x	1.5	=	12
4.5 Grand Total					107.5

Memorandum to Short-Listed Architects

QBS Template # 5

Page 1 of 3

To: *Philip Architects*

From: *Ontario Association of Architects*

Re: Request for "Project Proposal" and attendance at an Interview

Project Name : *Office Building A*

Project No.: *2006-106*

5.1 Invitation

We are pleased to advise that your practice has been short-listed for the above mentioned project. To satisfy the requirements of the next stage in the Architect selection process, you are now invited to prepare and submit a "Project Proposal" and to attend an interview.

5.2 Pre-design studies completed

Enclosed is a copy of *Building Program* by *Wilson Architect*, completed for the project to date for your information and review.

5.3 Contents of "Project Proposal"

5.3.1

Understanding of the Project

A brief statement of your understanding of the scope of the project and the needs of the client.

5.3.2

Proposed Methodology

1. A brief statement on your practice will approach the design and construction of the project.
2. A list and description of the proposed team members and consultants.
3. A statement of any opportunities or constraints that you envision could impact the project or your proposal for services.

5.3.3

Proposed Project Management

Explain your approach with respect to the management of client meetings, communications, approvals, schedules, cost and quality assurance controls.

5.3.4

Related Experience

Provide a statement that expands on your previous project experience and how that further qualifies the submission.

5.3.5

Proposed Form of Contract

1. Submit your proposed form of Contract, including Terms and Conditions, which you intend to use for this project.
2. State what consulting services are provided in the above contract and identify any consultants who will be retained directly by the client.

Memorandum to Short-Listed Architects

5.4 Submission Deadline and Requirements

5.4.1 Number of Copies required:

Please submit **6** copies of your "Project Proposal" to the following address before **11:30** a.m. p.m. local time on **Tuesday, June 20, 2006**.

5.4.2 Please submit "Project Proposal" to:

Name of Client/Organization

Ontario Association of Architects

Mailing Address

111 Moatfield Drive

City

Toronto

Province

ON

Postal Code

M3B 3L6

RE: Project Proposal

Office Building A

5.4.3 Facsimile or E-mail submissions:

1. Facsimile submissions are acceptable Not acceptable
2. E-mail submissions are acceptable Not acceptable

5.5 Tour of Project Site

1. A tour of the site and/or facility has been arranged for **Thursday, June 15, 2006 at 11:30 a.m.** .
2. Please have your representative make arrangements for a suitable time by contacting: *Name of Contact at area code - Telephone number*

5.6 Date, Time and Place of Interview

1. Interviews will be held on **Monday, June 26, 2006**
2. Your interview is scheduled for **2:30** a.m. p.m.
3. The interview will take place at **111 Moatfield Drive, Toronto**.

5.7 Interview Procedure

Each practice will be allowed **45** minutes to present qualifications and to respond to questions. Interviews will be scheduled **15** minutes apart.

5.8 Audio/Visual Materials during the Interview

The use of audio/visual materials to present proposals is permitted. Architects are required to provide the necessary equipment for their presentation. Five minutes will be permitted prior to the interview for set-up of equipment.

5.9 Project Proposal and Interview Scoring Criteria

1. Final selection will be based on a combination of the scores attained from both the Project Proposal Evaluation and the Interview.
2. Attached is a copy of the Project Proposal evaluation criteria that will be used to assess each "Project Proposal".
3. Attached is a copy of the Interview score sheet.

Memorandum to Short-Listed Architects**5.10 Short-List of Architectural Practices**

For your information the following practices have been short-listed and have been asked to submit "Project Proposals" and attend an interview.

Rank	Practice Name	Interview Date and Time
1	<i>Wilson Architect</i>	<i>June 26 - 10:00 a.m.</i>
2	<i>John Architect</i>	<i>June 26 - 11:00 a.m.</i>
3	<i>Philip Architect</i>	<i>June 26 - 1:00 p.m.</i>
4	<i>Johnson Architect</i>	<i>June 26 - 2:00 p.m.</i>
5	<i>Architect Group</i>	<i>June 26 - 3:00 p.m.</i>

5.11 Final Architect Selection Procedure

1. At the conclusion of the interviews, architects will be ranked in accordance with the scores attained from their Project Proposal and Interview.
2. The architect with the highest score deemed to be most qualified and compatible for this project will then be invited to prepare a Scope of Services and Fee Proposal for consideration.
3. Once the scope of services and the fee proposal have been jointly developed and agreed upon, the client and architect will enter into the signing and execution of the contract.
4. If contract terms cannot be reached, negotiations with the first-ranked architect will be abandoned and the architect ranked second will be invited for contract negotiations

Memorandum to Architects Not Short-Listed

To: *Richard Acme, Architect*

Acme Architects Inc.

From: *Ontario Association of Architects*

John Doe

Manager of Capital Projects

Re: Status of Architect Selection Process

Project Name: *Office Building A*

Project No: *2006-106*

6.1 Acknowledgment of your Submission

Ontario Association of Architects wishes thank you for submitting your "Statement of Interest and Qualifications" for the above noted project. Unfortunately your practice has not been short-listed. Although you were not selected, we appreciate your interest in our project and the resources spent on the preparation of your ""Statement of Interest and Qualifications".

6.2 List of Architectural Practices Short-listed

For your information, the following practices have been selected to submit "Project Proposals" and attend an interview.

Rank	Practice Name
1	<i>Wilson Architect</i>
2	<i>John Architect</i>
3	<i>Philip Architect</i>
4	<i>Johnson Architect</i>
5	<i>Architect Group</i>

**“Project Proposals”
Scoring Sheet**

QBS Template # 7

Page 1 of 1

Name of Project: <i>Office Building A</i>		Date: <i>June 21,2006</i>			
Name of Practice: <i>Johnson Architect</i>		Time: <i>1:30 p.m.</i>			
Name of Reviewer: <i>Jane Holden</i>					
Evaluation Criteria	Rating (1-5)	X	Weight (1, 1.5 or 2)	=	Total
7.1 Understanding of the Project (item 5.3.1)					
Architect understands the scope of the project and the needs of the client.	3	x	1.5	=	4.5
7.2 Proposed Methodology (item 5.3.2)					
1. Approach to the design and construction of the project.	3	x	1	=	3
2. The proposed team members and consultants.	4	x	1.5	=	6
3. Opportunities or constraints.	2	x	1	=	2
7.3 Proposed Project Management (Item 5.3.3)					
Approach to management of client meetings, communications, approvals, schedules, cost and quality assurance controls.	4	x	2	=	8
7.4 Related Project Experience (item 5.3.4)					
1. Number of projects of a similar type; and/or	2	x	1.5	=	3
2. Number of projects with similar professional services	1	x	1	=	1
7.5 Proposed Form of Contract (item 5.3.5)					
1. OAA Document 600, 2005 or RAIC Document 6 ,2006 submitted	5	x	1.5	=	7.5
2. Other form of Contract submitted	NA	x	1	=	0
7.6 Grand Total					35

Interview - Scoring Sheet

QBS Template # 8

Page 1 of 2

The purpose of the interview is to determine whether the client and the architect have compatible objectives, perspectives and attitudes. Questions should explore those concerns and the overall "chemistry" of the client/architect relationship.

Name of Project: *Office Building A* **Date:** *June 26, 2006*

Name of Practice: *John Architect* **Time:** *11:00 a.m.*

Name of Reviewer: *Jack Ryerson*

8.1 Interview Procedures

Architects invited to attend an interview should be prepared to address the following issues. Questions from the architect will be accepted after the panel has completed their questions and if time is available.

Evaluation Criteria	<u>Rating</u> (1-5)	X	<u>Weight</u> (1, 1.5 or 2)	=	Total
---------------------	------------------------	---	-----------------------------------	---	-------

8.2 Understanding of the Project

1. Architect understands the scope of the project brief and the needs of the client.	3	x	1.5	=	4.5
2. Architect understands the project constraints /opportunities.	4	x	1.5	=	6
3. Architect's of other client related issues	2	x	1.5	=	3

8.2 Proposed Project Team and Consultants

1. Related project experience, ability and capacity of proposed key personnel assigned to this project.	4	x	1	=	4
2. Related project experience, ability and capacity of the "Lead Liaison" to the client.	3	x	1.5	=	4.5
3. Related project experience, ability and capacity of proposed consultants.	2	x	1	=	2

8.3 Proposed Project Management – The practice's approach to the following:

1. Management of the project.	3	x	1.5	=	4.5
2. Client interface, reviews and approval process	3	x	2	=	6
3. Quality assurance systems	4	x	1.5	=	6
4. Cost control systems	3	x	2	=	6
5. Schedule and updating process	2	x	1.5	=	3
6. Troubleshooting procedures	3	x	1.5	=	4.5

Subtotal of Page 1

54

Interview - Scoring Sheet		QBS Template # 8			
Page 2 of 2					
8.4 Related Project Experience					
1. Quality and experience of projects of a similar type	3	x	1.5	=	4.5
2. Projects with similar professional services	2	x	1	=	2
8.5 Overall Impression					
1. Ability to express ideas	4	x	1.5	=	6
2. Ability to manage the project team	4	x	2	=	8
3. Ability/ past experience working with the client.	2	x	2	=	4
4. Communication/listening skills	3	x	1.5	=	4.5
5. Ability to be flexible/adaptable	5	x	1	=	5
6. Architect's response to the question - "Why should we select your practice for this project?"	4	x	2	=	8
Subtotal of Page 2					42
Subtotal of Page 1					54
8.6 Grand Total					96

Reviewer's Comments:
1. Architect had extensive experience with similar projects-
2. Lead person not at interview due to scheduling conflict.
3. Consultants have experience with our projects in the past.

Summary Evaluation Sheet

9.1 Application

Name of Compiler : *Mary Williams*

This form is intended to be used to compile scores of all practices that submitted "Statement of Interest and Qualifications", "Project Proposal" and attended the "Interview".

- | | | | |
|-------------------------------------|--------------------------------------------------|------------------------------------|----------------------------|
| <input checked="" type="checkbox"/> | Statement of Interest and Qualifications Summary | Date of Review <i>May 18, 2006</i> | Sheet <u>1</u> of <u>1</u> |
| <input type="checkbox"/> | Project Proposal Summary | Date of Review | |
| <input type="checkbox"/> | Interview Summary | Date of Review | |

9.2 Total Combined Score

	<i>John Architect</i>	<i>Wilson Architect</i>	<i>Philip Architect</i>	<i>Johnson Architect</i>	<i>Architect Group</i>
<i>Mary Williams</i>	95	110	107.5	108	89
<i>John Wilson</i>	94	98	102	98	98
<i>Jack Ryerson</i>	103	114	90	101.5	100
<i>Jane Holden</i>	94	105	98	105	98
<i>Brian Wikens</i>	101	89	110	89	95
Total Score	487	516	507.5	501.5	480
Ranking	<u>4</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>5</u>

Comments : Some issues with respect to John Architect submission – number of pages submitted in excess of 10 - two sections of submission contained blank pages

Memo to Architects Short-listed but not selected

To: *Ryan John*

John Architect

From: *Ontario Association of Architects*

John Doe

Manager of Capital Projects

Re: Completion of Architect Selection Process

Project Name : *Office Building A*

Project No: *2006-106*

10.1 Ranking of Architectural Practices Interviewed

Ontario Association of Architects has completed the selection process for professional services for the above mentioned project.

Although your practice was not selected, *Ontario Association of Architects* express their sincere appreciation for your time, effort and interest on our behalf

It has been our objective to select the practice whose qualifications and experience best suits our needs for this project. The evaluation results of the architect selection committee ranks the practices interviewed in the following order.

Rank	Practice Name
1	<i>Philip Architect</i>
2	<i>Wilson Architect</i>
3	<i>Johnson Architect</i>
4	<i>Architect Group</i>
5	<i>John Architect</i>

10.2 Contract Award

We have now entered into contract discussion and negotiations with *Philip Architect* .