

Sample of QBS Templates Filled Out



QBS Template # 1

Project Definition

Page 1 of 1

Name of Clien		mation				
	Name of Client/Organization			ct		
Ontario Association of Architects			Office Buildin	ng A		
Name of Contact Person John Doe			Project Location Project			
			Don Mills and	2006 - 106		
Contact's Mail	ing Address		City		Province	
111 Moatfeil	d Drive		Toronto ON			
City	Province	Postal Code	E-mail Addres	s of Contact	t Person	
Toronto	ON	M3B 6L6	Johnd@oaa.c	on.ca		
Telephone Nu	mber	Ext.	Fax Number			
416 449-	6898	309	416 449	-5756		
1 1 Dra daaia						
Preliminary sp	atial needs and	eted to date (o program has bee s shortlisted and	en developed by		rchitects Inc. and	
Preliminary sp will be availab	atial needs and le to those firms	program has bee	en developed by		rchitects Inc. and	
Preliminary sp	atial needs and le to those firms of Project: Vork:	program has bee	en developed by invited for an in on: F	terview.	supancy Date:	
Preliminary sp will be availab 1.5 Timeline Start Design V September 5 1.6 Approval Final proposed	atial needs and le to those firms of Project: Vork: , 2006 Requirements d design will be p	program has bee shortlisted and Start Constructi April, 2007 : presented to mer	en developed by invited for an in on: F nbers of the ass	terview. Planned Occ July 15, 20 ociation for	upancy Date: 08	



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

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Sept. 5, 2006

Project proceeds.

QBS Template # 2 Time Frame for Architect Selection Page 2 of 2 Conduct Tour(s) of facilities or project site 2.11 <u>June 15, 2006</u> at 10:30 a.m. at Don Mills Road and Moatfield Drive . Hold interviews with short-listed firms, at times and June 26, 2006 2.12 locations previously communicated. Work with highest-ranked architect to develop and July 15, 2006 2.13 refine the scope of the work. Request Architect to prepare scope of services and fee 2.14 proposal contract which is to be submitted to the client July 25, 2006 for consideration. <u>August 5,</u> Contract is reviewed, negotiated and signed. 2.15 2006 Send memorandum to all architects indicating interview <u>August 10,</u> 2.16 results. 2006



To: Phillip Architect

Memorandum to request "Statement of Interest and Qualifications"

QBS Template #3

Page 1 of 3

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.*

2. Other studies include. Sitting Studies by Flamming Architec

3.3 Background Information

Attached to this memo are:

- 1. Project Definition (QBS Form 1)
- 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 \Box three years \boxtimes five years.
3.4.5	Project Management and Cost Control
	 Include examples of project budgeting, cost estimating indicating and results/outcomes.
	Include the name of the project, the contact person and the estimated/final construction value for the project cited above.



QBS Template #3 Memorandum to request "Statement of Interest and Qualifications". Page 2 of 3 3.4.6 References Provide the name and telephone number of three recent references from the projects listed or similar projects. 3.4.9 **Practice Methodology** 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. 3.4.10 Submission Limits You are invited to include additional information to support your qualifications; however the total number of pages for submission requirements is not to exceed 10 pages (plus resumes). Submissions exceeding this limit will not be considered. Page sizes are limited to X 11" (letter) X 11" (letter) 8 ½ X14" (legal) 11" x 17" (oversize) 3.5 Architect Selection Process 3.5.1 Number to be Selected Five architectural practices will be selected for interviews. The selection will be based solely on the review of the "Statement of Interest and Qualifications". 3.5.2 "Project Proposal" Submission Architects selected will be invited to submit a more detailed "Project Proposal" and attend an interview. 3.5.3 Facility/ Project Site Tour Prior to the interview, practices selected to submit a "Project Proposal" will be invited to tour: \Box the facility \boxtimes the project site. 3.5.4 **Quality Based Selection Process** 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). 3.6 Submission Deadline and Requirements 3.6.1 Number of copies required: Please submit six copies of your "Statement of Interest and Qualifications" to the following address before 11:00 🛛 **a.m. p.m**. local time on Tuesday, May 15, 2006. 3.6.2 Late Submissions Late submissions will not be accepted and will be returned unopened.



Memo	o requesting			QBS Template #3		
"Stat	ement of Inter	est and Qualific	ations".	Page 3 of 3		
3.6.3	Submit "Statem					
	Name of Client/O Ontario Associa	rganization tion of Architects				
	Mailing Address 111 Moatfield D	rive				
	City Toronto	Province ON	Postal Code M3B 6B3			
	Name of person/c Attn: John Doe					
	Reference RE: Office Build	ing A				
3.6.4	Person to conta	Person to contact for additional information				
	Name of Contact John Doe					
	Telephone Numbe 416-449-6898					
	E-mail address of Johnd@oaa.on.c					
3.6.5	Facsimile or E-n	nail submissions:				
	1. Facsimile subm	issions are 🗌 accep	table 🛛 Not acceptable			
	2. E-mail submiss	sions are 🗌 acceptab	le 🛛 Not acceptable			
3.6.6	Additional comr	nents or requireme	ents:			
	None					



"Statement of Interest and Qualifications" QBS Template # 4					
Scoring Sheet Page 1 of 1					
Name of Project: Office Building A			Date: May 2	0, 20	006
Name of Practice: Philip Architect			Time: 3:30	p.m.	
Name of Mary Williams					
Evaluation Criteria	<u>Score</u> (1-10)	Х	<u>Weight</u> (1, 1.5 or 2)	=	Total
4.1 Presentation					
1. All submission requirements provided.	8	х	1	=	8
2. Clarity and organization of material.	6	х	1	=	6
4.2 Qualifications (Based on resumes for assigned staff and const	ultants.)				
 Assigned staff - education, professional qualifications, professional development. 	10	x	1.5	=	15
 Consultants - education, professional qualifications, professional development. 	7	х	1.5	=	10.5
4.3 Experience (Based on the list of similar projects provided v last (5) years.)	vith the sub	omissio	n completed ir	1	
1. Number of projects of a similar type; or	7	х	2	=	14
 Number of projects of similar scale/complexity; or 	8	х	1.5	=	12
3. Number of projects with similar professional services	3	х	1	=	3
4.4 References (Based on client references provided with the s	ubmission.)			
Reference No.1 Mars Office Building	10	х	1.5	=	15
Reference No.2 London Office	8	х	1.5	=	12
Reference No.3 <i>Engineer Office</i>	8	х	1.5	=	12
4.5 Grand Total					107.5



Memorandum to Short-Listed Architects

QBS Template # 5

Page 1 of 3

To:	Philip	Architects
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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
	 A brief statement on your practice will approach the design and construction of the project. A list and description of the proposed team members and consultants. 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
	 Submit your proposed form of Contract, including Terms and Conditions, which you intend to use for this project. 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

QBS Template # 5

Page			
Page	2	of	3

				Tage 2 of a			
5.4 Sub	mission Deadli	ne and Require	ements				
5.4.1	Number of Co	Number of Copies required:					
Please submit 6 copies of your "Project Proposal" to the following address b 11:30 🛛 a.m. □p.m. local time on Tuesday, June 20, 2006.							
5.4.2	Please submi	t "Project Propo	sal" to:				
	Name of Client Ontario Asso	/Organization ciation of Archit e	ects				
	Mailing Addres 111 Moatfield						
	City Toronto	Province ON	Postal Code M3B 3L6	RE: Project Proposal Office Building A			
5.4.3	Facsimile or	E-mail submissic	ons:				
	1. Facsimile su	bmissions are 🗌	acceptable 🖂 Not a	acceptable			
	2. E-mail subm	nissions are 🗌 acc	ceptable 🛛 Not acc	eptable			
5.5 Tou	r of Project Sit	e					
		e site and/or facilit <i>June 15 , 2006</i>	ty has been arrange at 11:30 a.m	ed for			
			ve make arrangem <i>at area code - Tele</i>	ents for a suitable time by phone number			
5.6 Dat	e, Time and Pla	ace of Interview	N				
2. Yo	nterviews will be ho bur interview is scl ne interview will ta	neduled for 2:30		oronto.			
5.7 Inte	erview Procedu	re					
•	ctice will be allowe vs will be schedule	•	•	s and to respond to questions.			
5.8 Aud	lio/ Visual Mate	rials during the	e Interview				
provide t		pment for their pr		ted. Architects are required to nutes will be permitted prior to			
5.9 Pro	oject Proposal a	and Interview S	Scoring Criteria				
	nal selection will b			es attained from both the Project			

- Proposal Evaluation and the Interview.
 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

QBS Template # 5

Page 3 of 3

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	Wilson Architect	June 26 - 10:00 a.m.
2	John Architect	June 26 - 11:00 a.m.
3	Philip Architect	June 26 - 1:00 p.m.
4	Johnson Architect	June 26 - 2:00 p.m.
5	Architect Group	June 26 - 3:00 p.m.

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

QBS Template # 6

Page 1 of 1

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	Wilson Architect
2	John Architect
3	Philip Architect
4	Johnson Architect
5	Architect Group



"Project Proposals" QBS Template # 7						
Scoring Sheet Page 1 of 1						
Name of Project: Office Building A		[Date: June 2	21,20	006	
Name of Johnson Architect		1	Time: 1:30	p.m.		
Name of Jane Holden Reviewer:						
Evaluation Criteria	<u>Rating</u> (1-5)	X	<u>Weight</u> (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)					-	
 Approach to the design and construction of the project. 	3	х	1	=	3	
2. The proposed team members and consultants.	4	х	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	х	2	=	8	
7.4 Related Project Experience (item 5.3.4)						
1. Number of projects of a similar type; and/or	2	х	1.5	=	3	
 Number of projects with similar professional services 	1	х	1	=	1	
7.5 Proposed Form of Contract (item 5.3.5)						
 OAA Document 600, 2005 or RAIC Document 6 ,2006 submitted 	5	x	1.5	=	7.5	
2. Other form of Contract submitted	NA	х	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: <i>June 26, 2006</i>		
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.

Evalu	Evaluation Criteria		х	<u>Weight</u> (1, 1.5 or 2)	=	Total
8.2 Ur	nderstanding 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	х	1.5	=	6
3.	Architect's of other client related issues	2	x	1.5	=	3
8.2 Pr	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	х	1.5	=	4.5
3.	Related project experience, ability and capacity of proposed consultants.	2	х	1	=	2
8.3 Pr	8.3 Proposed Project Management – The practice's approach to the following:					
1.	Management of the project.	3	х	1.5	=	4.5
2.	Client interface, reviews and approval process	3	х	2	=	6
3.	Quality assurance systems	4	х	1.5	II	6
4.	Cost control systems	3	х	2	=	6
5.	Schedule and updating process	2	х	1.5	=	3
6.	Troubleshooting procedures	3	х	1.5	=	4.5
Subtotal of Page 1					ge 1	54



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QBS Templa Interview - Scoring Sheet					ate # 8
				age 2 of 2	
8.4 Related Project Experience					
 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
 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	х	1	=	5
 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

QBS Template # 9

Page 1 of 1

9.1 Application Name of Compiler : Mary Williams								
This form is intended to be Qualifications", "Project Pr		scores of all pract	ices that submitted			erest and		
🛛 Statement of Inte	tions Summary I	Date of Review May 18, 2006 Sheet <u>1</u> of <u>1</u>						
Project Proposal Summary Date of Review								
Interview Summar	I	Date of Review						
9.2 Total Combined S	core							
	John Architect	Wilson Architect	Philip Architect	Johnson Architect Architect		Architect Group		
Mary Williams	95	110	107.5	108		89		
John Wilson	94	98	102	98 9		98		
Jack Ryerson	103	114	90	101.5 10		100		
Jane Holden	94	105	98	105 98		105		98
Brian Wikens 101 89 110 89 95					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

QBS Template # 10

Page 1 of 1

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	Philip Architect
2	Wilson Architect
3	Johnson Architect
4	Architect Group
5	John Architect
10.2 Co	ontract Award
	now entered into contract discussion and negotiations with <i>Philip Architect</i> .