



Niagara Catholic District School Board

ARCHITECT AND CONSULTANT SELECTION POLICY

STATEMENT OF POLICY

700 – Buildings And Site

Policy No 701.1

Adopted Date: February 24, 1998

Latest Reviewed/Revised Date: April 22, 2014

In keeping with the Mission, Vision and Values of the Niagara Catholic District School Board, the Board and its staff will ensure that architectural and design consultant services are provided by a variety of firms and that work is awarded in a fair and open manner. The manner in which services are selected shall reflect the professional nature of the services being provided, with Requests for Proposals used for significant projects.

The Director of Education will issue Administrative Procedures for the implementation of this Policy.

References:

- [*National Guide to Sustainable Municipal Infrastructure*](#)
- [*Ontario Association of Architects*](#)
- [*Niagara Catholic District School Board Policies/Procedures*](#)
 - [*Accessibility Standards Policy \(800.8\)*](#)
 - [*Purchasing/Supply Chain Management Policy \(600.1\)*](#)



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ADMINISTRATIVE PROCEDURES

700 – Buildings And Site

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ARCHITECT SELECTION PROCESS

The process for selection of architects and engineering consultants shall be guided by the *Qualifications Based Selection Process* as recommended by the National Guide to Sustainable Municipal Infrastructure and the Ontario Association of Architects

RATIONALE

The objective of the architect selection process is to select an architect who is best qualified for a specific project, and to provide the benefit of the architect's skill, knowledge and experience to jointly develop a scope of services that considers all opportunities for adding value. These opportunities would include exploring new and innovative methods for continuous improvement and linking capital expenditures with operations and maintenance costs over the lifecycle of the asset. Lifecycle costing is critical because projects requiring architects are long-term investments, paid for with public funds. Best value for the Board means the asset is delivered with the least financial impact in the long-term.

Generally, the Request for Proposal process requires submission of a fee component for the proposed work. The fee component is often allocated considerable weight in the evaluation, with the result that the lowest-priced proposal is often accepted on the assumption that it represents best value. A price-based selection process is not appropriate for professional consulting services because it is frequently not possible to provide sufficient detail about the services required to ensure that all firms are bidding on equal footing. This is because part of the undertaking may be an exploration for the most appropriate solution. The most appropriate solution is not necessarily the least costly design solution.

This qualifications-based selection process diverges from price-based selection practices in that it frees architects to demonstrate how they can add maximum value to the Board's project rather than focusing on how to minimize their fees to 'win' an assignment. The process of selecting an architect based on qualifications does not preclude consideration of price. It simply removes it from the consultant evaluation phase and introduces it once the scope of service has been determined. The architect is then required to provide a work breakdown with the proposed fee.

CONSULTANTS LIST

Based on information received from requests for *Statements of Interest and Qualifications* and from past history of excellent service to the Board and other clients, the Controller of Facilities Services will maintain a list of firms on a Consultants List for assignment of work.

CAPITAL PROJECTS - MINOR

For projects estimated to cost less than \$ 1,000,000 the appropriate Manager of Facilities Services, subject to the direction of the Controller of Facilities Services, shall select a firm to implement the work from the list of consultants. Such work will normally be billed on an hourly basis.

CAPITAL PROJECTS - MAJOR

For projects estimated to cost more than \$1,000,000, architects and engineering consultants shall be selected in accordance with the appended *Qualifications Based Selection Templates and Related Instructions*.

A committee, chaired by the Controller of Facilities Services, for scoring the *Statement of Interest and Qualifications* submissions, as well as the *Project Proposals* and *Interviews*, shall consist of the following members:

- Trustee(s) as selected by the Chair of the Board (normally local Trustees should be given first consideration)
- The appropriate Superintendent of Education or Director of Education
- The Principal of the School or representative of the site
- Two Facilities Services Staff

The Board shall be informed as soon as possible of the final architect selection.

An appropriate contractual agreement will be issued to the successful firm to reflect the provisions in the *Scope of Services and Fee Proposal* including modifications negotiated by The Controller of Facilities Services.

Approval for architectural and/or consulting services for all capital projects shall be in compliance with the Purchasing/Supply Chain Management Policy.

RELATED DOCUMENTS

- [*Interview Scoring Sheet*](#)
- [*Project Definition - Form & Instructions*](#)
- [*Project Proposal - Letter Template*](#)
- [*Project Proposal Scoring Sheet*](#)
- [*Statement of Interest & Qualifications - Letter Template*](#)
- [*Statement of Interest & Qualifications - Letter Template, Proposals Not Accepted*](#)
- [*Statement of Interest & Qualifications Scoring Sheet - Form & Instructions*](#)
- [*Statement of Ranking - Letter Template*](#)
- [*Summary Evaluation Sheet*](#)
- [*Time Frame for Architect Selection - Form & Instructions*](#)