

REGULATION #6204.1

SELECTION OF PROJECT ARCHITECTS AND/OR CONSULTANTS

1. OBJECTIVE

The high standards established by the Surrey Board of Education in [Policy 6204 - Selection of Project Architects and or Consultants](#) make the selection of capable architects and/or consultants for school projects a vital task.

The stated obligation of the board “to provide school facilities that are flexible, functional, durable, economical, environmental and aesthetically pleasing,” must become the objective of architects and/or consultants appointed by the board for any project whether it be new construction, an addition or alterations and renovations. The mechanical and electrical components must be well designed and complete in every respect, therefore, sound engineering will be an important consideration. Last, but not least, the architects and/or consultants must be capable of providing exemplary supervision of the construction to ensure that it is completed on schedule and in strict accordance with the plans and specifications.

2. SELECTION COMMITTEE

A Selection Committee comprising the following personnel shall be responsible for selecting architects and/or consultants in accordance with the competitive bidding process:

- a) Chairperson; secretary-treasurer or designate

Minimum of three members from the following district staff:

- a) Assistant secretary-treasurer
- b) Director, Physical Plant & Transportation Services
- c) Assistant Director, Physical Plant & Transportation Services
- d) Associate Director, Business Management Services
- e) Superintendent or designate
- f) Other staff as designated by secretary-treasurer

Selected members should ensure that there are no conflict of interest issues that could jeopardize the evaluation process and subsequent results.

3. PREPARATION BY MEMBERS OF THE SELECTION COMMITTEE

- 3.1. Each member should become familiar with the facilities to be provided in the project and any unique problems that may be encountered or indeed any outstanding features that may be extant, e.g., physical features of site;

REGULATION #6204.1

SELECTION OF PROJECT ARCHITECTS AND/OR CONSULTANTS

location; if additions, the features or present buildings, displacement of students during construction, etc.

- 3.2. Each member should independently list what he or she considers to be important factors to consider in developing the project, e.g., program needs, creative design, mechanical and electrical, economy, roof design, child-centered school with special features, scheduling, preferred building materials, etc.
- 3.3. Each member should become aware of the date the facility is required and begin to formulate a timeline and, in the process, identify aspects of the project that may lead to complications, thereby delaying development or construction, and ensure this data is included in the Request for Proposal document.
- 3.4. Each member should complete the weighting criteria documentation to support the competitive bidding process.
- 3.5. Consideration should be included in the weighted criteria to allow for alternative methods of service delivery for a project if it would be appropriate to consider alternatives.

4. COMPETITIVE BIDDING PROCESS

The procurement of architect and/or consultant services will be in accordance with Trade Agreements, district purchasing policy and based on the principles of fair and open public sector procurement: competition, demand aggregation, value for money, transparency and accountability. The district will follow a multi-step competitive bidding process for selection of an architect and/or consultant.

4.1. Request for Pre-Qualification

The pre-qualified process reduces the time and costs for both the district and potential proponents. Responses will be evaluated in terms of specific qualifications and experience. A short-list of qualified architects and/or consultants (the number of proponents to be determined by the Selection Committee) will be established, who would then bid through a Request for Proposals for future project work.

REGULATION #6204.1

SELECTION OF PROJECT ARCHITECTS AND/OR CONSULTANTS

4.2. Request For Proposal

The pre-qualified architects and/or consultants will be offered the opportunity through the Request for Proposal to be awarded a project. Proposals are evaluated based on specific mandatory and preferred (scored) criteria, including but not limited to:

- a) Project Team Composition, Organization and Qualifications
- b) Project Experience
- c) Proponent Methodology and Approach
- d) Project Philosophy and Understanding
- e) Value Added Information
- f) References. The district, at its own discretion, may perform reference evaluations for potential architects and/or consultants.

The best overall proposal based on the highest score would proceed to contract negotiation, utilizing industry standard contracts.

5. COMPETITIVE BIDDING SEQUENCE OF EVENTS

The competitive bidding process for assessing and completing the evaluations must be based on the principles of fair and open public sector procurement. The Competitive Bidding Process includes the following sequence of events.

5.1. Sequence of Events

- a) Project business case
- b) Selection of committee members
- c) Complete timelines for competitive bidding process milestones and key dates
- d) Establish scope of work and evaluation criteria for 'Request for Pre-Qualifications' and 'Request for Proposal'
- e) Weight Evaluation criteria according to section 4
- f) Issue Request for Pre-Qualifications in an open public forum, in accordance with Trade Agreements, District Purchasing Policies and other regulatory requirements.
- g) Receive Request for Pre-Qualifications proposals before closing date

REGULATION #6204.1

SELECTION OF PROJECT ARCHITECTS AND/OR CONSULTANTS

- h) Committee members score Request for Pre-Qualifications proposals
- i) Committee members short-list architects and/or consultants
- j) Issue Request for Proposals to pre-qualified architects and/or consultants
- k) Receive Request for Proposals before closing date
- l) Committee members score 'Request for Proposals'
- m) Award project to successful architects and/or consultants.

5.2. The Selection Committee Chairperson

The chairperson shall keep a record of all documents and deliberations of the committee, as the process is subject to disclosure under the Provincial Freedom of Information legislation. The chairperson is responsible to ensure the evaluation is a fair objective process.

- a) Document timelines for competitive bidding process bearing in mind the period of time required to complete the selection process and the architects and/or consultants work that will follow.
- b) The "critical path" will be completed to ensure the project award; start up and implementation are successful.
- c) Ensure each member complete the appropriate weighting criteria documentation.
- d) Establish a consensus of award criteria included in the supporting application of the weighted criteria.
- e) Distribute copies of the proposals to each committee member. All discussions and related information should be kept confidential (and kept secure) during the evaluation process.
- f) Each member of the selection committee, after contemplating the project as above, should, after reviewing the proposals, in accordance to the committee's weighting and award criteria, submit the names of the architects and/or consultants that the member recommends for appointment.
- g) Collect evaluation scoring sheets. Members should ensure that comments and related notes are concise, and objective.
- h) Prepare Evaluation Summary Sheet.
- i) Issue award letter to the successful architects and/or consultants.

REGULATION #6204.1

SELECTION OF PROJECT ARCHITECTS AND/OR CONSULTANTS

5.3. Presentation and Clarification

The Selection Committee, may, at its election, during the evaluation and after the RFP closing date, invite a proponent to provide a presentation or clarification of its proposal, either in writing or by meeting directly with the selection committee.

6. EVALUATION CRITERIA

The following criteria are intended as a representative list that might be used in selecting architects and/or consultants. Each project will have its own challenges and characteristics which will give rise to other criteria that should be considered in the selection process. These and other criteria will be used formally and informally throughout the selection process.

6.1. Basic Criteria for Selection

- a) Demonstrated ability to discern and translate the educational philosophy and program needs of the project into the design.
- b) Demonstrate comprehension and analysis of difficulties, problems, strengths, weaknesses of building or site.
- c) Demonstrate ability to translate the specific instructions given by the owner and follow through with advice and prompt action.
- d) Awareness of the time factors involved in school projects and one established in co-operation with the board, a commitment to adhere to the schedule.
- e) Creativity in design as illustrated in the list of previous completed projects that are similar in size, scope and complexity of project.
- f) Previous experience working with school districts.
- g) Provide assurance that firm can meet district insurance requirements.
- h) Company profile including brief history, size of firm, and location of main office.
- i) Structural, mechanical and electrical engineering capability by listing of sub-consultants.
- j) Extent to which pre-engineered components have been used by the firm.

REGULATION #6204.1
SELECTION OF PROJECT ARCHITECTS AND/OR CONSULTANTS

- k) Firms experience with designs, incorporating 'green' sustainable, energy efficient, or LEED principles.
- l) Correlation of
 - i. cost per square metre
 - ii. cost per student
 - iii. total area as percentage usable for instructional purposes and maintain at a reasonable level
- m) Supervision of construction administration phase:
 - i. frequency of visits to job site
 - ii. specialist supervision
- n) Resident location of architects and/or consultants and whether there would be charges to the board beyond normal fee. Availability for consultation either by telephone or meetings.
- o) Demonstrate ability to complete projects within budget through the use of quantity surveyors.
- p) Such other criteria as are unique to the project.

Revised: 2008-05-08

2003-12-16

Reference: 1983-02-21