



Applicant Self-Report of Supervised Work Experience

Note: This self-report form includes both **Mandatory** and **Non-mandatory** tasks.

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For Reference Only
Competencies that may be required to perform tasks:

- Communication
- Professional and Business Practice
- Codes and Regulations
- Design Process
- Design Theory
- Human Environment
- Product and Materials
- Construction

Design Phase 1: Pre-design

Name:

Submission date:

ID	Task	Relevant Notes	Supervisor Name	Completed														
1.1	Research client or project type			<input type="checkbox"/>	*		*	*	*	*	*							
1.2	Assess opportunity and determine if project falls within scope of practice			<input type="checkbox"/>	*	*	*	*	*	*								
1.3	Determine scope of services for the project in order to write contract			<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*				
1.4	Identify stakeholders			<input type="checkbox"/>	*	*	*	*										*
1.5	Create client/project file			<input type="checkbox"/>	*													
1.6	Define roles and responsibilities for the stakeholders and project team			<input type="checkbox"/>	*	*	*	*										*
1.7	Identify design team			<input type="checkbox"/>	*	*	*	*										
1.8	Identify and solicit proposals for sub-consultants			<input type="checkbox"/>	*	*	*	*										*
1.9	Identify sustainability and/or wellness requirements			<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*				*
1.10	Identify historic context			<input type="checkbox"/>	*			*	*	*								
1.11	Identify construction delivery methods with client			<input type="checkbox"/>	*	*	*	*									*	*
1.12	Develop proposal			<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*				*
1.13	Prepare contracts, fee structures, payment schedule and gain client approval			<input type="checkbox"/>	*	*												
1.14	Prepare a preliminary project schedule with input from client			<input type="checkbox"/>	*	*	*	*								*	*	

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Design Phase 2: Programming

ID	Task	Relevant Notes	Supervisor Name	Completed														
2.1	Gather information to establish user needs			<input type="checkbox"/>	*	*	*	*					*	*				
2.2	Site review and analysis			<input type="checkbox"/>	*		*	*					*	*				
2.3	Conduct visioning sessions with client			<input type="checkbox"/>	*	*		*	*	*	*	*	*					
2.4	Assist client in determining a project approach			<input type="checkbox"/>	*	*	*	*	*	*	*	*						*
2.5	Develop an initial design concept			<input type="checkbox"/>	*		*	*	*	*	*	*	*	*	*	*	*	*
2.6	Identify and define sustainability design goals and requirements			<input type="checkbox"/>	*	*	*	*			*	*	*	*	*	*	*	*
2.7	Develop a comprehensive functional program document			<input type="checkbox"/>	*		*	*	*	*	*	*	*	*	*	*	*	*
2.8	Co-ordinate preliminary budget allocation			<input type="checkbox"/>	*	*	*	*			*	*	*	*	*	*	*	*
2.9	Update preliminary project schedule			<input type="checkbox"/>	*	*	*	*	*	*			*	*	*	*	*	*
2.10	Present program to client			<input type="checkbox"/>	*		*	*	*	*			*	*	*	*	*	*
2.11	Refine program based on client feedback			<input type="checkbox"/>	*		*	*	*	*			*	*	*	*	*	*
2.12	Obtain client approval			<input type="checkbox"/>	*	*												

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Design Phase 3: Schematic Design

ID	Task	Relevant Notes	Supervisor Name	Completed															
3.1	Identify relevant code and regulation requirements			<input type="checkbox"/>	*	*						*	*						
3.2	Investigate multiple design options			<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
3.3	Finalize spatial relationship diagram			<input type="checkbox"/>	*	*	*	*	*	*	*								
3.4	Develop preliminary design concept			<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
3.5	Develop preliminary design studies/sketches			<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
3.6	Develop space plan options			<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
3.7	Review preliminary drawings for code compliance			<input type="checkbox"/>	*	*	*					*	*						*
3.8	Develop preliminary floor plan			<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
3.9	Develop preliminary FF&E plan			<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
3.10	Develop preliminary lighting design concept			<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
3.11	Develop preliminary ceiling plan			<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
3.12	Coordinate schematic design with sub-consultants and obtain input on building systems impacting the design solution			<input type="checkbox"/>	*	*	*	*	*	*	*			*	*	*	*	*	*
3.13	Review and refine the project schedule			<input type="checkbox"/>	*	*		*				*	*						*
3.14	Co-ordinate the review and refinement of cost estimates			<input type="checkbox"/>	*	*	*	*				*	*						*
3.15	Review schematic drawings to ensure that all programmatic requirements have been met			<input type="checkbox"/>	*	*	*	*			*	*	*	*	*	*	*	*	*
3.16	Present schematic design solution to client			<input type="checkbox"/>	*		*	*	*	*	*	*	*	*	*	*	*	*	*
3.17	Refine schematic design based on client feedback			<input type="checkbox"/>	*		*	*	*	*	*	*	*	*	*	*	*	*	*
3.18	Obtain client approval on schematic design solution			<input type="checkbox"/>	*	*													

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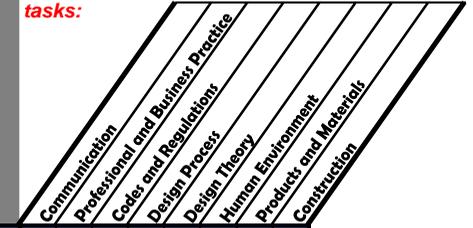
Design Phase 4: Design Development

ID	Task	Relevant Notes	Supervisor Name	Completed													
4.1	Develop detailed floor plan			<input type="checkbox"/>	*		*	*	*	*	*	*	*	*	*	*	*
4.2	Research and assist client to establish budget for FF&E			<input type="checkbox"/>	*	*		*		*	*	*	*	*	*	*	*
4.3	Develop detailed furniture plan			<input type="checkbox"/>	*		*	*		*	*	*	*	*	*	*	*
4.4	Audit the design for code compliance			<input type="checkbox"/>	*		*	*		*	*	*	*	*	*	*	*
4.5	Research and obtain cost estimates for finishes & materials			<input type="checkbox"/>	*	*	*	*		*	*	*	*	*	*	*	*
4.6	Review life cycle costs of finishes and materials with the client to identify long-term impact of the proposed selections			<input type="checkbox"/>	*	*		*		*	*	*	*	*	*	*	*
4.7	Develop detailed lighting plan			<input type="checkbox"/>	*		*	*		*	*	*	*	*	*	*	*
4.8	Develop finish plan/schedules			<input type="checkbox"/>	*		*	*		*	*	*	*	*	*	*	*
4.9	Coordinate design with sub-consultants to incorporate building systems and engineering requirements into the design solution			<input type="checkbox"/>	*		*	*		*	*	*	*	*	*	*	*
4.10	Prepare interior design specifications			<input type="checkbox"/>	*		*	*		*	*	*	*	*	*	*	*
4.11	Co-ordinate the review and refinement of cost estimates			<input type="checkbox"/>	*	*	*	*		*	*	*	*	*	*	*	*
4.12	Design and draw elevations			<input type="checkbox"/>	*		*	*	*	*	*	*	*	*	*	*	*
4.13	Design and draw sections			<input type="checkbox"/>	*		*	*	*	*	*	*	*	*	*	*	*
4.14	Refine and further develop 3-D views			<input type="checkbox"/>	*		*	*	*	*	*	*	*	*	*	*	*

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Design Phase 4: Design Development

Task	Relevant Notes	Supervisor Name	Completed														
4.15	Design and draw details		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.16	Design reflected ceiling plans		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.17	Design power and communications plan		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.18	Design specialized millwork/architectural woodwork		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.19	Review and refine the project schedule		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.20	Assist client in establishing a preliminary budget		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.21	Request and review mock-ups or samples from vendors		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.22	Develop way-finding/environmental graphics design options		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.23	Create 3-D renderings		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.24	Create presentation boards and concept presentation		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.25	Present design development package to client		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.26	Revise design package based on client feedback		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.27	Co-ordinate artwork selection, custom/commissioned finishes, and landmarks.		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*
4.28	Obtain client approval of design development package		<input type="checkbox"/>	*	*	*	*	*	*	*	*	*	*	*	*	*	*

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Design Phase 5: Contract Documents

Task	Relevant Notes	Supervisor Name	Completed														
5.1	Finalize project schedule		<input type="checkbox"/>	*	*							*	*				
5.2	Review the final design solution against the code requirements and ensure compliance		<input type="checkbox"/>	*		*	*					*	*				
5.3	Prepare contract documents		<input type="checkbox"/>	*		*	*					*	*				
5.4	Review and redline contract documents		<input type="checkbox"/>	*		*	*					*	*				
5.5	Coordinate contract documents with all sub-consultants		<input type="checkbox"/>	*	*	*	*					*	*				
5.6	Review and finalize the cost estimate		<input type="checkbox"/>	*	*	*						*	*				
5.7	Finalize contract documents		<input type="checkbox"/>	*		*	*					*	*				
5.8	Submit contract documents for permits		<input type="checkbox"/>	*	*	*											
5.9	Present final contract documents to client		<input type="checkbox"/>	*		*	*										
5.10	Revise contract documents based on client feedback		<input type="checkbox"/>	*		*	*										
5.11	Obtain client approval of final contract documents		<input type="checkbox"/>	*	*												

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Design Phase 6: Bidding / Tendering

ID	Task	Relevant Notes	Supervisor Name	Completed													
6.1	Prepare bid documents			<input type="checkbox"/>	*	*	*	*					*	*			
6.2	Pre-qualify bidders			<input type="checkbox"/>	*	*											*
6.3	Distribute bid documents			<input type="checkbox"/>	*	*											
6.4	Conduct bid orientation meeting with bidders			<input type="checkbox"/>	*	*											*
6.5	Respond to Request for Information (RFI)			<input type="checkbox"/>	*	*	*						*	*			
6.6	Issue addenda			<input type="checkbox"/>	*	*	*						*	*			
6.7	Review bid submissions with client			<input type="checkbox"/>	*	*							*	*			
6.8	Prepare recommendation to client for contract award			<input type="checkbox"/>	*	*							*	*			

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Design Phase 7: Contract Administration

ID	Task	Relevant Notes	Supervisor Name	Completed													
7.1	Develop and/or coordinate purchase requisitions for FF&E			<input type="checkbox"/>	*	*		*				*	*				
7.2	Procure FF&E			<input type="checkbox"/>	*	*							*				
7.3	Conduct site visits to review compliance with design intent and observe construction progress			<input type="checkbox"/>	*	*	*						*	*			
7.4	Prepare site visit reports			<input type="checkbox"/>	*	*	*						*	*			
7.5	Review and approve submittals			<input type="checkbox"/>	*	*	*						*	*			
7.6	Respond to site conditions			<input type="checkbox"/>	*		*										*
7.7	Respond to Request for Information			<input type="checkbox"/>	*		*						*	*			
7.8	Manage changes to the contract			<input type="checkbox"/>	*	*	*						*	*			
7.9	Monitor project schedule			<input type="checkbox"/>	*		*						*	*			
7.10	Participate in construction meetings			<input type="checkbox"/>	*		*						*	*			
7.11	Review general contractor's submissions for substitutions			<input type="checkbox"/>	*		*	*					*	*			
7.12	Develop and monitor deficiency list			<input type="checkbox"/>	*	*	*						*	*			
7.13	Monitor FF&E installation			<input type="checkbox"/>	*		*						*	*			
7.14	Administer Certificates of Payment for client			<input type="checkbox"/>	*	*	*						*	*			

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Design Phase 8: Project Conclusion

ID	Task	Relevant Notes	Supervisor Name	Completed													
8.1	Monitor move-in			<input type="checkbox"/>	*											*	
8.2	Prepare and review close-out documentation			<input type="checkbox"/>	*		*									*	*
8.3	Financial close-out of project			<input type="checkbox"/>	*	*		*									*
8.4	Perform internal practice analysis (i.e., what did we learn?)			<input type="checkbox"/>	*	*											*
8.5	Perform internal efficiency evaluation			<input type="checkbox"/>	*	*											
8.6	Perform design analysis			<input type="checkbox"/>	*	*											
8.7	Follow-up on deficiencies			<input type="checkbox"/>	*		*									*	*