



## Architectural Experience Program

### AXP Portfolio

#### Practice Management

Tasks	Work Sample Demonstrating Competent Performance
Adhere to ethical standards and codes of professional conduct	Letter from supervisor/mentor; letter to or from client; letter to or from consultant; brief written report addressing this topic
Comply with laws and regulations governing the practice of architecture	Letter from architect supervisor; building or planning permit; brief written report addressing this topic
Prepare final procurement and contract documents	Client contract; consultant contract; RFP; RFQ
Understand implications of project delivery technologies	Sketches; digital presentations; letter to client recommending a type of project delivery
Participate in professional development activities that offer exchanges with other design professionals	Continuing education transcripts; evidence of professional presentations given at conferences; professional development conference registrations
Understand implications of policies and procedures to ensure supervision of design work by architect in responsible charge/control	Letter from architect supervisor; quality control procedure documents; brief written report addressing this topic
Maintain positive work environment within firm that facilitates cooperation, teamwork, and staff morale	Participation in office committees; leadership in project team; professional development review
Develop and maintain effective and productive relationships with clients	Reference letter from client; project close-out letter; project follow-up

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Tasks	Work Sample Demonstrating Competent Performance
Develop professional and leadership skills within firm	Participation in office committees; professional development review; certificate of completion from a leadership development program
Prepare proposals for services in response to client requirements	RFP sections; pre-proposal meeting minutes; research documents/findings depicting insight on client requirements
Participate in community activities that may provide opportunities for design of facilities that reflect community needs	Photos of events attended; information surveys written by applicant; letter from leader of community activity describing candidate's role
Develop procedures for responding to contractor requests (Requests for Information)	Checklist for RFI response, plus RFI response; documentation of conversations with client and/or firm leadership on process documentation
Prepare marketing documents that accurately communicate firm's experience and capabilities	Marketing proposal or brochure prepared by applicant; PowerPoint (or similar) presentations; evidence of online or virtual media demonstrating marketing capabilities
Establish procedures for documenting project decisions	Code checklist or similar document for a project; meeting minutes; examples of template forms (RFI, change orders, meeting minutes, site visit documentation, etc.)
Develop procedures for responding to changes in project scope	Checklist for scope change, CO request to client; examples of template forms (RFI, change orders, meeting minutes, site visit documentation, etc.)
Establish procedures to process documentation during contract administration	Request for information; notice of clarification; shop drawing logs; punchlist; similar contract administration documents



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#### Project Management

Tasks	Work Sample Demonstrating Competent Performance
Participate in pre-construction, pre-installation and regular progress meetings with design team	Sign-in sheet demonstrating candidate was in attendance; agenda; meeting minutes
Coordinate design work of consultants	Coordination meeting minutes; correspondence with consultants; letters from consultants describing the candidate's coordination efforts on a project
Determine project schedule	Provide a project schedule depicting internal milestones (quality control, printing, etc.) and external milestones (client receives deliverable, design review meeting date, etc.)
Understand implications of project delivery methods	A letter from candidate to client/firm/design team members indicating the scope of work, fee, and project delivery methods; samples of different delivery contracts for projects
Prepare written communications related to design ideas, project documentation and contracts	Design submittals; emails; letters; written contracts
Monitor project schedule to maintain compliance with established milestones	Project schedules with updates/modifications during project, emails or other relevant documents that describe a recovery plan in the event that more staffing is required
Assist Owner in obtaining necessary permits and approvals	Authority having jurisdiction submittals, comments, comment responses, plan approvals, PowerPoint presentations given to Owner/City Council/any approving authority
Conduct periodic progress meetings with design and project team	Meeting minutes; Outlook meeting invitations distributed to design team; agenda
Identify changes in project scope that require additional services	Correspondence; additional service proposals; contract modifications
Manage information exchange during construction	Data logs (i.e. submittals, RFIs, etc.); meeting minutes; capturing information exchange; site visit reports with photograph excerpts

**AXP Portfolio****Project Management**

<b>Tasks</b>	<b>Work Sample Demonstrating Competent Performance</b>
Perform quality control reviews throughout the documentation process	Quality control review checklists, meeting minutes; red-lined drawings performed by candidate
Determine scope of services	Fee letter and proposal; meeting minutes or documentation of scoping efforts between candidate and owner
Monitor performance of design team consultants	Email or documentation from candidate to consultant's point of contact providing update on performance
Present design concept to stakeholders	PowerPoint presentations; meeting minutes; design models; submittals
Resolve conflicts that may arise during design and construction process	Email or documentation from candidate demonstrating conflict resolution
Manage implementation of sustainability criteria	LEED (or other facilitating program) checklist; documents demonstrating sustainability goals; letter from client describing candidate's sustainability initiatives in project
Determine design fee budget	Fee letter and fee proposals; man-hour estimates
Collaborate with stakeholders during design process to maintain design intent and comply with Owner specifications	A document that captures candidate's comments after performing an interdisciplinary coordination review; red-lined drawings; meeting minutes of coordination meetings
Coordinate design work of in-house team members	A document that captures candidate's comments after performing an interdisciplinary coordination review; red-lined drawings; meeting minutes of coordination meetings
Prepare Architect-Consultant Agreement	A contract; documentation of dialogue between the professional liability insurance provider/attorney discussing contract clauses; documentation of conversations between candidate and consultant
Assist client in determining delivery method for construction of project	Letter from client that describes candidate's efforts; letter of recommendation from candidate to client providing the recommendation
Prepare Owner-Architect Agreement	A contract; documentation of dialogue between the professional liability insurance provider/attorney discussing contract clauses; documentation of conversations between candidate and owner

**AXP Portfolio****Project Management**

<b>Tasks</b>	<b>Work Sample Demonstrating Competent Performance</b>
Perform constructability review to determine buildability, bidability, and construction sequencing of proposed project	Provide a quality control review document that captures candidate's comments after performing an interdisciplinary coordination review; red-lined drawings; relevant checklists
Establish methods for Architect-Client communication based on project scope of work	Job plan that depicts method of communication; phone logs with client; email documentation with client documenting key decisions
Manage modifications to the construction contract	RFI response on formal template; meeting minutes capturing information exchange; change order documentation endorsed by candidate
Perform constructability reviews throughout the design process	Provide a quality control review document that captures candidate's comments after performing an interdisciplinary coordination review; red-lined drawings
Define roles and responsibilities of team members	Project team directory with work plan; design consultant fee letter and scope of services proposal
Manage project-specific bidding process	Pre-bid meeting agenda and meeting minutes, addenda; bid form and log
Evaluate appropriateness of building information modeling (BIM) for proposed project	Project software comparison matrix
Submit schedule of Architect's services to Owner for each phase	A contract that demonstrates the scope of work and deliverables for each phase of design; a schedule of values that assigns a dollar amount relative to the total fee assigned to each design deliverable
Prepare staffing plan to meet project goals	Project work plan with staff assigned; a document from a scheduling program (ex: PlanTrax) that depicts the actual project percent complete versus goal to date percent complete
Assist client in selecting contractors	Letter from client that describes candidate's efforts; contractor request for qualifications; bid log



## Architectural Experience Program

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#### Programming & Analysis

Tasks	Work Sample Demonstrating Competent Performance
Determine impact of applicable zoning and development ordinances to determine project constraints	Zoning & building code analysis documentation
Analyze existing site conditions to determine impact on facility layout	Graphic site analysis, including environmental conditions
Determine impact of environmental, zoning and other regulations on site	Graphic site analysis, including environmental conditions
Prepare diagrams illustrating spatial relationships and functional adjacencies	Bubble diagrams; 3D + section programming models representing vertical adjacencies; program stacking; other programming logics that might inform a concept massing organizational strategy
Prepare site analysis diagrams to document existing conditions, features, infrastructure and regulatory requirements	Graphic site analysis, including environmental conditions and land/topo/utility surveys; 3D models illustrating zoning-compliant massing / programming strategies
Assist Owner in preparing building program including list of spaces and their characteristics	Project programming document, including summary of space square footages; other programming logics that might inform a concept massing organizational strategy
Gather information about client's vision, goals, budget, and schedule to validate project scope and program	Project programming document; agenda or minutes from a client meeting; copy of a 3rd party document to form the basis of design and/or part of owner/architect agreement
Assess environmental impact to formulate design decisions	Graphic site analysis, including environmental conditions, diagrams, preliminary site planning, geotech report, environmental reports
Consider results of environmental studies when developing site alternatives	Graphic site analysis, including environmental conditions, diagrams, preliminary site planning, geotech report, environmental reports

**AXP Portfolio****Programming & Analysis**

<b>Tasks</b>	<b>Work Sample Demonstrating Competent Performance</b>
Establish sustainability goals affecting building performance	Meeting minutes from environmental kick-off meeting with clients; LEED checklist; any supplemental budgetary analysis evaluating pros and cons of achieving certain levels of certification
Establish project design goals	Meeting minutes from kick-off meeting with clients establishing aesthetic goals, budget goals, sustainability goals, performance criteria, and time frame
Consider recommendations from geotechnical studies when establishing design parameters	Structural schematics; preliminary site planning; geotech report; environmental reports
Develop conceptual budget	Project budget; cost estimate; written review of contractor's preliminary estimate
Evaluate opportunities and constraints of alternative sites	Site studies with report on pros/cons; preliminary site planning; geotech report; environmental reports
Determine impact of existing transportation infrastructure on site	Graphic site analysis, including transit infrastructure, entry/exit onto streets, setbacks, servitudes/easements, height limitations, FAR, etc.
Review legal documents related to site to determine project constraints	Site analysis with planning & zoning report, including covenants, easements, etc.
Gather information about community concerns and issues that may impact proposed project	Project programming document, agenda or minutes from a client meeting on related subject matter
Evaluate results of feasibility studies to determine project's financial viability	Report/minutes regarding project cost/benefit; preliminary cost opinion/rough order of magnitude; preliminary project timeline



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#### Project Planning & Design

Tasks	Work Sample Demonstrating Competent Performance
Perform building code analysis	Written building code analysis or worksheet
Prepare code analysis documentation	Graphic building code plan; completed code search or code analysis document; correspondence regarding code analysis
Select materials, finishes, and systems based on technical properties and aesthetic requirements	Material schedule; cut sheets of products or finishes; listing of clients technical requirements for finishes; materials and systems; examples of completed finish boards.
Prepare design alternatives for client review	Examples of design options which were presented to a client; sketches or other in-progress documents from creating design alternatives.
Oversee design integration of building components and systems	Progress/development drawings; final drawings; coordination meeting minutes
Review local, state and federal codes for changes that may impact design and construction	Completed code analysis document; correspondence with code officials; written documentation of other codes that may impact design and construction.
Determine impact of existing utilities infrastructure on site	Preliminary site narrative; existing site survey; conceptual site plan
Understand implications of evolving sustainable design strategies and technologies	Sustainability diagrams; correspondence with team members or consultants; meeting minutes



## AXP Portfolio

### Project Planning & Design

Tasks	Work Sample Demonstrating Competent Performance
Develop sustainability goals based on existing environmental conditions	Sustainability checklist and diagrams; meeting minutes; correspondence regarding sustainability.
Define requirements for site survey based on established project scope	Request for proposal for site survey; site survey contract
Determine design parameters for building engineering systems	Meeting minutes & agendas; questionnaire; correspondence with owner and engineers; design parameters checklist.
Present design ideas to client orally	Design presentation meeting minutes and agenda
Evaluate results of feasibility studies to determine project's technical viability	Documentation of studies; feasibility study follow-up correspondence/reports
Prepare Cost of Work estimates	Floor plans, sections, elevations used for estimates; supporting documentation on sources of pricing
Apply principles of historic preservation for projects involving building restoration or renovation	Meeting notes; historic preservation checklist; correspondence with team members
Develop mitigation options to address adverse site conditions	examples of alternate site plans; correspondence regarding alternate plans.
Design landscape elements for site	Landscape plans; sections, etc. plant options; renderings/3D views



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#### Project Development

Tasks	Work Sample Demonstrating Competent Performance
Communicate design ideas to the client graphically	Drawings, sketches, renderings, images, etc. used in correspondence with client.
Prepare submittals for regulatory approval	Exhibits prepared for regulatory reviews; checklists of documents required for regulatory approval.
Communicate design ideas to client with two-dimensional (2-D) computer aided design software	Floor plans, elevations, sections, or other views created specifically for communicating with the client.
Select furniture, fixtures and equipment that meet client's design requirements and needs	Cut sheets of products; clients requirements for furniture, fixtures and equipment; meeting minutes
Communicate design ideas to the client using hand drawings	Sketches and design presentation submittal using hand drawings
Communicate design ideas to client with three-dimensional (3-D) computer aided design software	Renderings, or other views created specifically for communicating with the client.
Update Cost of Work estimates	Floor plans used for estimates; supporting documentation on sources of pricing; revised construction cost estimates



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#### Construction & Evaluation

Tasks	Work Sample Demonstrating Competent Performance
Review shop drawings and submittals during construction for conformance with design intent	Returned shop drawings or submittals with comments; correspondence regarding submittals with contractor
Respond to Contractor Requests for Information	RFI responses; correspondence regarding RFI's.
Complete field reports to document field observations from construction site visit	Issued field reports, construction photos, notes from a site visit.
Review results from field reports, third-party inspections, and other test results for conformance with contract documents	Correspondence regarding these documents; examples of returned documents.
Review Application and Certificate for Payment	Examples of approved documents
Manage project close-out procedures and documentation	Punch list; certificate of substantial completion; final application for payment; operation and maintenance manual submittal reviews