



ARCHITECTURAL INSTITUTE OF BRITISH COLUMBIA

ARCHITECTURE CENTRE  
SUITE 100 - 440 CAMBIE STREET  
VANCOUVER BC CANADA  
V6B 2N5

TEL: 604 683 8588 / TOLL FREE IN BC: 1 800 667 0753

FAX: 604 683 8568 / 1 800 661 2955

E-MAIL: AIBC@AIBC.CA

INTERNET: WWW.AIBC.CA

## **BULLETIN 55: TARIFF FOR MARKET MULTIPLE-RESIDENTIAL SECTOR**

**DECEMBER 2001**

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Further to the *Architects Act* and Bylaws 28 and 29, the AIBC Council has endorsed an amended approach with regard to both the recommended net architectural percentage fees and the scope of basic architectural services in the “Market Multiple-Residential Sector”. This approach represents a professionally supportable departure from the familiar, traditional “Basic Services” package in Appendix I of the AIBC Tariff and carries with that a corresponding, more flexible, sliding scale of recommended fees. It was developed under the auspices of the AIBC’s Fees and Services Committee, within the Practice Board.

The chief amendments relative to Appendix I’s Basic Services are, broadly: (1) **Add**: services respecting one cycle of zoning/development permit applications across the schematic and design development phases; (2) **Delete**: bidding and negotiation phase services; (3) **Delete**: cost estimating in all phases; and (4) **Delete**: construction contract administration and payment certification.

### **Transitional Considerations**

Existing client/architect agreements and proposals already submitted are not affected by this bulletin. New proposals of services-and-fees and new agreements are expected to be in substantial compliance with the amended Tariff (cf. Bylaw 34.16) by March 08, 2002.

### **Summary of Approach to the “Market-Multiple Residential Sector” Tariff**

These results stem from the research and findings of a working group (representing 14 architectural firms) that met over the past two years with the objective of updating the Tariff of Fees for Architectural Services for *new* construction in the Market Multiple Residential Sector. Market Multiple Residential *renovations* were not considered. The phrase “market” suggests a developer-initiated project not involving public agency participation. Usually in this sector, the terms of the contractual relationship between the owner and the builder, who in most cases is (effectively) the same party, are neither disclosed to, nor administered by the architect. Projects characterized as being non-market, or congregate care, were outside the scope of this review and its recommendations.

Part of the approach was to develop some empirical data to ascertain what are the current acceptable fees for services in this sector. Members of the working group prepared proposals for a number of hypothetical projects based on the number of hours it would take to do the projects. This was a form of cost-check and the catalyst to clarify the basic assumptions underlying the services provided.

Cross-reference was made to the chart of services (Sequence and Scope) on the last page of the current Tariff. There are black dots beside some of the services that denote “basic” and therefore are covered by the Tariff’s percentage-fee recommendations. The origin of this list is the research and development work of the first (1986) Tariff, monitored and updated since, and kept consistent with standard client-architect agreements, construction contracts and building regulations. The consensus is that the chart has become somewhat out of step with what is currently the practice in this sector. The enclosed modified list of Basic Services was developed and endorsed for this sector.

It is notable that in this sector, contrary to the current standard basic services in the Tariff and NPP Client-Architect Agreement, Document 6, one cycle of the rezoning and development permit process is commonly included in basic services. On the other hand, tendering is not usually included, and neither are any services related to progress certificates or quantification of the value of the work. While it is recognized that the architect needs to approve changes to the work, and to be aware of relevant communications, the change order procedure does not necessarily require the organizational framework, in this case, as it does for other sectors.

A review of construction documents was done and a list of necessary Construction Documents (including working drawings and specifications) was developed. Since tendering and contract administration are not included in basic services, the specifications in this sector consist mostly of products, performance standards, assembly illustrations and schedules to satisfy code compliance (i.e. the so-called “technical” and quality assurance aspects).

The number of variables to consider in providing services during construction makes it extremely difficult to be precise about the fees. The reviews generically identified in the current Tariff’s Basic Services chart were expanded and a sequential checklist of field reviews was prepared.

To translate the estimated hours for our hypothetical sample projects into a fee an hourly rate of \$85.00 was used. This was assumed to be a blended rate. It was noted that the beginning and ending of the project take more “principal’s” time than do the intermediate phases.

### **Specific Amendments to the AIBC Tariff of Fees for Architectural Services:**

1. Basic Services: Add (as Appendix II) the enclosed Sequence and Scope of Services Chart for Market Multiple Residential Sector Projects, found on this Bulletin’s last page. (Note: for ease of comparison, the body of this Bulletin shows both the current Chart 1, and Chart 2 for this sector, side-by-side in newly matching formats).

2. Net percentage Fee Scale, page 27: Delete Table 9 (A) New Construction Market and replace with the attached graph for new construction (note the list of assumptions in applying the graph). Delete Table 9 (A) Renovations Market and replace with N/A. Note that 3.6.5 Renovations to Existing Buildings (versus New Construction) provides a fair approach to assessing fees for additions and renovations.
3. To 3.1 Alternate Methods of Establishing Fees: Add the following: “For Services during Construction - i.e. after Building Permit, for Market Multiple Residential Projects, due to the number and the potential impact of the variables on the scope of services and the number and duration of field trips, it is recommended that these services be performed a time-basis (see 3.4), hourly or per diem. The Tariff should be used as a budget reference. It should be kept in mind that the timing and frequency of field reviews must be at the discretion of the architect. It would be prudent for the architect and the client to preview the type of field observations the architect must make. If the extent of field services exceeds what was anticipated, the architect should advise the client of this at an early stage to ensure proper services and to avoid conflicts regarding fees.” (Notwithstanding the above, the percentage-fee scales do account for reasonably anticipated construction-phase services.)
4. To 3.2 Allocation of Total Basic Fee to Phases of Service: Add the following: “For Multiple Residential projects: Services for Schematic and Design Development phases together constitute about 40 to 45% of the fee and Contract Documentation constitutes about 40 to 45% of the fee. The fees for Services During Construction would range from 10 to 20% of the fee.”
5. Amend 3.5.1 Operating Assumptions by adding: “For Market Multiple Residential projects refer to the Sequence and Scope of Services for Market Multiple Residential Projects in the corresponding Appendix II.”

*The AIBC does not provide legal, accounting or insurance advice and expressly disclaims any responsibility for any errors or omissions with respect to legal, accounting or insurance matters that may be contained herein. Readers of AIBC documents are advised to consult their own legal, accounting or insurance representatives to obtain suitable professional advice in those regards.*

<b>Sequence and Scope of Services Charts Comparison of 1.0 Predesign Phase</b>	
<b>Sequence and Scope of Services Chart 1 (from current Tariff)</b>	<b>Sequence and Scope of Services Chart 2 (Market Multiple-Residential Sector)</b>
	<b>1.1 Basic Services:</b>
	No Pre Design Services are Included in Basic
<b>Architect's Services</b>	<b>1.2 Additional Services:</b>
o Facility Programming	o <i>Facility Programming</i>
o Space Relationships	o <i>Space Relationships</i>
o Flow Diagrams	o <i>Flow Diagrams</i>
o Project Development/Scheduling	o <i>Project Development/Scheduling</i>
o Project Budgeting	o <i>Project Budgeting</i>
o Life Cycle Cost Studies	o <i>Life Cycle Cost Studies</i>
o Economic Feasibility Studies	o <i>Economic Feasibility Studies</i>
o Agency Consulting/Review/Approval	o <i>Agency Consulting/Review/Approval</i>
o Site Selection/Analysis/Utilization	o <i>Site Selection/Analysis/Utilization</i>
o Environmental Studies	o <i>Environmental Studies</i>
o Energy Studies	o <i>Energy Studies</i>
o Existing Facilities Surveys	o <i>Existing Facilities Surveys</i>
o Client-supplied Data Coordination	o <i>Client-Supplied Data Coordination</i>
o Project Management	o <i>Project Management</i>
o Presentations	o <i>Presentations</i>
o Marketing Studies	o <i>Marketing Studies</i>
o Project Financing	o <i>Project Financing</i>
o Special Studies	o <i>Special Studies</i>
o Re-zoning Assistance	o <i>Re-zoning Assistance</i>
o Project Promotion	o <i>Project Promotion</i>
o OCP/Zoning Review	o <i>OCP/Zoning Review</i>
o Obtain Consultants' Proposals	o <i>Obtain Consultants' Proposals</i>
<b>Special Consultants' Services</b>	o <i>Coordination of Special Consultants (e.g. Surveyor, Geotechnical, Environmental, etc.)</i>
o Legal Survey	
o Land Survey	
o Geotechnical Analysis	
o Environmental	
o Urban Planning	
o Collect Site Data	
o Municipal Bylaw Review (Historic, Creeks, Hazardous Materials, etc.)	
o Foreign Practices Review	
o Project Scheduling	

- Basic Services: normally provided as integrated set by architect under Standard Forms of Agreement; form basis of fees in section 3.5.3
- o Additional Services: provided to meet specific project needs

<b>Sequence and Scope of Services Charts Comparison of 2.0 Schematic Design Phase</b>	
<b>Sequence and Scope of Services Chart 1 (from current Tariff)</b>	<b>Sequence and Scope of Services Chart 2 (Market Multiple-Residential Sector)</b>
<b>Architect's Services</b>	<b>2.1 Basic Services:</b>
• Client-Supplied Data Coordination	• Client-Supplied Data Coordination
	• Collect and Analyze Site Data
	• Review Land-use Regulations
	• Identify Urban Design Issues
	• Site Utilization Studies
	• Identify Rezoning, Development Permit, OCP Issues
	• Identify Regulatory Framework
	• Integrate Client Supplied Data (e.g. Survey, Geotech etc.)
• Program and Budget Evaluation/Review	
• Review Site Characteristics	• Review Site Characteristics
• Review Alternate Design Approaches	• Review Alternate Design Approaches
• Architectural Schematic Design	• Architectural Schematic Design
• Schematic Design Coordination	• Schematic Design Coordination
• Drawings & Documents	• Drawings & Documents
• Review Construction Contract Types	
• Statement of Probable Construction Costs	
• Client Consultation	• Client Consultation
• Agency Consultation	• Agency Consultation
• Building Code Review	• Building Code Review
	• Coordination of Normal Consultants (e.g. Structural, Mechanical, Electrical, On-Site Civil, Landscape)
	<b>2.2 Additional Services:</b>
	◦ <i>Review Contracts or Methods of Project Delivery</i>
	◦ <i>Financial Feasibility Study</i>
	◦ <i>Statement of Probable Construction Costs</i>
	◦ <i>Obtain Consultants Proposals</i>
◦ Interior Design Concepts	◦ <i>Interior Design Concepts</i>
◦ Special Studies; e.g. Future Facilities, Environmental Impact	◦ <i>Special Studies; e.g. Future Facilities, Environmental Impact</i>
◦ Special Submissions or Promotional Presentations	◦ <i>Special Submissions or Promotional Presentations</i>
◦ Special Models or Perspectives	◦ <i>Models or Perspectives</i>
◦ Project Management	◦ <i>Project Management</i>
	◦ <i>Program and Budget Evaluation</i>
◦ Value Analysis	◦ <i>Value Analysis</i>
◦ Building Envelope Professional Services	◦ <i>Building Envelope Professional Services</i>
<b>Coordination of Normal Engineering Services</b>	
• Structural Design Concepts	
• Mechanical Design Concepts	
• Electrical Design Concepts	
• Statements of Probable Costs	
• Agency Consultation	
• Building Code Review	
◦ Value Analysis	

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<b>Sequence and Scope of Services Charts Comparison of 2.0 Schematic Design Phase</b>	
<b>Sequence and Scope of Services Chart 1 (from current Tariff)</b>	<b>Sequence and Scope of Services Chart 2 (Market Multiple-Residential Sector)</b>
<b>Special Consultants' Services</b>	○ <i>Coordination of Special Consultants (e.g. Geotechnical, Environmental, Traffic, etc.)</i>
○ Geotechnical Design Concepts	
○ Civil Design Concepts	
○ Landscape Concepts	
○ Statements of Probable Costs	
○ Building Code Review	
○ Zoning Amendments	
○ Zoning Variance	
○ Municipal Bylaw Review	
○ Foreign Practices Review	
○ OCP/ Zoning Analysis	
○ Traffic Studies	
○ Urban Design/Streetscape	
○ View/Sun/Shadow Studies	
○ Area Analysis	

- Basic Services: normally provided as integrated set by architect under Standard Forms of Agreement; form basis of fees in section 3.5.3
- Additional Services: provided to meet specific project needs

<b>Sequence and Scope of Services Charts Comparison of 3.0 Design Development Phase</b>	
<b>Sequence and Scope of Services Chart 1 (from current Tariff)</b>	<b>Sequence and Scope of Services Chart 2 (Market Multiple-Residential Sector)</b>
<b>Architect's Services</b>	<b>3.1 Basic Services:</b>
● Client-Supplied Data Coordination	● Client-Supplied Data Coordination
● Design Coordination	
● Architectural Design Development	● Architectural Design Development
● Design Development Coordination	● Design Development Coordination
● Drawings & Documents	● Drawings & Documents
● Statement of Probable Construction Costs	
	● Rezoning Submission *
	● Design Panel Submission *
	● Prepare Urban Context Material
	● Prepare Exterior Materials and Colour Board
● Client Consultation	● Client Consultation
● Agency Consultation	● Agency Consultation
● Building Code Review	● Building Code Review
● Development Permit Submission	● Development Permit Submission
● Budget Review/Evaluation	
	● Coordinate Normal Consultants (e.g. Structural, Mechanical, Electrical, On-Site Civil, Landscape)
	* One Cycle of the Process
	<b>3.2 Additional Services:</b>
	○ <i>Re Submissions or Extraordinary Revisions to Obtain Regulatory Approvals</i>
	○ <i>Statement of Probable Construction Costs</i>
	○ <i>Budget Review/Evaluation</i>
○ Certified Professional Service	○ <i>Certified Professional Service</i>
	○ <i>Building Code Equivalency Research</i>
○ Interior Design Development	○ <i>Interior Design Development</i>
○ Special Studies Reports; e.g. Planning Tenant or Rental Spaces	○ <i>Special Studies Reports; e.g. Planning Tenant or Rental Spaces</i>
○ Promotional Presentations	○ <i>Promotional Presentations</i>
○ Models or Perspectives	○ <i>Models or Perspectives</i>
○ Project Management	○ <i>Project Management</i>
○ Rezoning Variance Submission	
○ Value Analysis	○ <i>Value Analysis</i>
○ Building Envelope Professional Services	○ <i>Building Envelope Professional Services</i>
<b>Coordination of Normal Engineering Services</b>	
● Structural Design Development	
● Mechanical Design Development	
● Electrical Design Development	
● Budget Review/Evaluation	
● Statements of Probable Costs	
● Agency Consultation	
● Building Code Review	
○ Value Analysis	<b>Continued...</b>

<b>Sequence and Scope of Services Charts Comparison of 3.0 Design Development Phase</b>	
<b>Sequence and Scope of Services Chart 1 (from current Tariff)</b>	<b>Sequence and Scope of Services Chart 2 (Market Multiple-Residential Sector)</b>
<b>Special Consultants' Services</b>	○ <i>Coordination of Special Consultants (e.g. Traffic, Environmental, Acoustical)</i>
○ Geotechnical Design Development	
○ Civil Design Development	
○ Landscape Design Development	
○ Detailed Construction Cost Estimates, Quantity Surveys	
○ Fire Protection	
○ Acoustics	
○ Building Code Equivalencies	
○ Certified Professional Service	
○ Energy Utilization Studies	
○ Building Envelope Professional Services	

- Basic Services: normally provided as integrated set by architect under Standard Forms of Agreement; form basis of fees in section 3.5.3
- Additional Services: provided to meet specific project needs

<b>Sequence and Scope of Services Charts Comparison of 4.0 Construction Documents Phase</b>	
<b>Sequence and Scope of Services Chart 1 (from current Tariff)</b>	<b>Sequence and Scope of Services Chart 2 (Market Multiple-Residential Sector)</b>
<b>Architect's Services</b>	<b>4.1 Basic Services:</b>
• Client-Supplied Data Coordination	• Client-Supplied Data Coordination
• Project Coordination	
• Architectural Construction Documents (Working Drawings, Form of Contract and Specifications)	• Prepare Architectural Working Drawings for Building Permit Submission
	• Prepare Door, Window, Finish Schedules
	• Research Materials and Prepare Specifications
• Document Checking and Coordination	• Document Checking and Coordination
• Statement of Probable Construction Costs	
• Client Consultation	• Client Consultation
• Agency Consultation	• Agency Consultation
• Building Code Review	• Building Code Review
• Letters of Assurance	• Letters of Assurance
• Budget Review/Evaluation	
• Coordinating Registered Professional Role	• Coordinating Registered Professional Role
• Building Permit Submission	• Assist with Building Permit Filing
	• Coordination of Normal Consultants (e.g. Structural, Mechanical, Electrical, On-Site Civil, Landscape)
	<b>4.2 Additional Services:</b>
	◦ <i>Statement of Probable Construction Costs</i>
	◦ <i>Preparation of Project Budget</i>
◦ Certified Professional Service	◦ <i>Certified Professional Service</i>
◦ Interior Construction Documents	◦ <i>Interior Construction Documents</i>
	◦ <i>Interior Elevations</i>
	◦ <i>Detailed Millwork Design</i>
	◦ <i>Reflected Ceiling Plans</i>
	◦ <i>Review of Form of Contract</i>
◦ Alternate Bid Details & Special Bid Documents	◦ <i>Alternate Bid Details &amp; Special Bid Documents</i>
◦ Project Management	◦ <i>Project Management</i>
◦ Area Analysis	◦ <i>Area Analysis</i>
◦ Project Lease Plans	◦ <i>Project Lease Plans</i>
◦ Tenant Layout Drawings	◦ <i>Tenant Layout Drawings</i>
◦ Multiple Contracts Management	◦ <i>Multiple Contracts Management</i>
◦ Phased Construction Management	◦ <i>Phased Construction Management</i>
◦ Building Envelope Professional Services	◦ <i>Building Envelope Professional Services</i>
<b>Coordination of Normal Engineering Services</b>	
• Structural Construction Documents	
• Mechanical Construction Documents	
• Electrical Construction Documents	
• Statements of Probable Costs	
• Building Code Review	<b>Continued...</b>
• Letters of Assurance	
• Budget Review/Evaluation	
• Building Permit Submissions	

<b>Sequence and Scope of Services Charts Comparison of 4.0 Construction Documents Phase</b>	
<b>Sequence and Scope of Services Chart 1 (from current Tariff)</b>	<b>Sequence and Scope of Services Chart 2 (Market Multiple-Residential Sector)</b>
<b>Special Consultants' Services</b>	○ <i>Coordination of Special Consultants (e.g. Traffic, Environmental, Building Envelope Professional, Surveyor, Geotechnical)</i>
○ Geotechnical Documents	
○ Civil Construction Documents	
○ Detailed Construction Cost Estimates, Quantity Surveys	
○ Fire Protection	
○ Acoustics	
○ Building Code Equivalencies	
○ Certified Professional Service	
○ Energy Utilization Analysis	
○ Security System Design	
○ Existing Condition Surveys	
○ Building Envelope Professional Services	

- Basic Services: normally provided as integrated set by architect under Standard Forms of Agreement; form basis of fees in section 3.5.3
- Additional Services: provided to meet specific project needs

<b>Sequence and Scope of Services Charts Comparison of 5.0 Bidding or Negotiation Phase</b>	
<b>Sequence and Scope of Services Chart 1 (from current Tariff)</b>	<b>Sequence and Scope of Services Chart 2 (Market Multiple-Residential Sector)</b>
<b>Architect's Services</b>	<b>5.1 Basic Services:</b>
	No Tender Services are Included in Basic
	<b>5.2 Additional Services:</b>
● Client-Supplied Data Coordination	○ <i>Client-Supplied Data Coordination</i>
● Coordinate Issue of Bid Documents	○ <i>Coordinate Issue of Bid Documents</i>
● Coordinate/Issue Addenda	○ <i>Coordinate/Issue Addenda</i>
● Bid Evaluation	○ <i>Bid Evaluation</i>
	○ <i>Evaluate Bidders Alternates</i>
● Client Consultation	○ <i>Client Consultation</i>
● Prepare Contracts	○ <i>Prepare Contracts</i>
○ Separate Bids or Negotiated Bids	○ <i>Separate Bids or Negotiated Bids</i>
○ Services Related to Bidders' Proposals	○ <i>Services Related to Bidders' Proposals</i>
	○ <i>Respond to Bidders Inquiries</i>
○ Project Management	○ <i>Project Management</i>
○ Prepare Prequalification Criteria	○ <i>Prepare Prequalification Criteria</i>
○ Prequalify Contractors	○ <i>Pre-qualify Contractors</i>
	○ <i>Services as a Building Envelope Professional</i>
<b>Coordination of Normal Engineering Services</b>	○ <i>Coordination of Consultants</i>
● Prepare Bid Documents	
● Prepare Addenda	
● Bid Evaluation	
<b>Special Consultants' Services</b>	
○ Prepare Bid Documents	
○ Prepare Addenda	
○ Bid Evaluation	
○ Prepare Prequalification Criteria	
○ Prequalify Contractors	

- Basic Services: normally provided as integrated set by architect under Standard Forms of Agreement; form basis of fees in section 3.5.3
- Additional Services: provided to meet specific project needs

<b>Sequence and Scope of Services Charts</b> <b>Comparison of 6.0 Construction Contract Administration Phase</b>	
<b>Sequence and Scope of Services Chart 1</b> <b>(from current Tariff)</b>	<b>Sequence and Scope of Services Chart 2</b> <b>(Market Multiple-Residential Sector)</b>
<b>Architect's Services</b>	<b>6.1 Basic Services:</b>
• Construction Inspection/Field Review	• Field Reviews to Ascertain Conformance with Construction Documents and Applicable Codes
	• Respond to Client's, Contractor's and AHJ's Inquiries and Change Requests
• Progress Reports' Evaluation	
• Certificates for Payment	
• Interpretation of Contract Documents	• Interpretation of Construction Documents
• Shop Drawing/Product Data/Sample Review	• Shop Drawing/Product Data/Sample Review
• Change Orders & Change Directives	• Site Instructions
• Review of Warranties (1)	
• Client Consultation	• Client Consultation
• Letters of Assurance	• Letters of Assurance
• Coordinating Registered Professional Role	• Coordinating Registered Professional Role
• Substantial Performance Report and Certification (1)	
• Deficiency Assessment (1)	• Building Code Deficiency Assessment for Occupancy Permit*
• Instructions for Correction of Deficiencies (1)	
	• Services for Building Commissioning as Defined in BCBC 98
• Final Inspection and Certification for Payment (1)	
• Agency Consultation	• Agency Consultation
	*One Assessment Report
	<b>6.2 Additional Services:</b>
	○ Administration of the Contract
	○ Progress Report Evaluation
	○ Substantial Performance Certificate(s) and Associated Deficiency Assessment
	○ Administration of Lien Holdback
	○ Certificates for Payment
	○ Interpretation of Contracts
○ Interior Construction Inspection/Field Review	○ Interior Construction Inspection/Field Review
○ Full-Time Project Rep	○ Full-Time Project Representative
	○ Issue Change Orders or Change Directives
	○ Review of Warrantees
○ Admin. of Separate Contracts	○ Administration of Separate Contracts
○ Project Management	○ Project Management
○ Promotional Material	○ Promotional Material
○ Record (As-Built) Drawings	○ Record (As-Built) Drawings
○ Certification re: Financing	○ Certification re: Financing
○ Alternate Dispute Resolution Services	○ Alternate Dispute Resolution Services
○ Certified Professional Service	○ Certified Professional Service
○ Multiple Contracts Management	○ Multiple Contracts Management
○ Phased Construction Management	○ Phased Construction Management
○ Building Envelope Professional Services	○ Building Envelope Professional Services
○ Payment certifier role for subcontracts (Lien legislation)	○ Payment Certifier Role for Subcontracts (Lien Legislation)
	<b>Continued...</b>

<b>Sequence and Scope of Services Charts</b> <b>Comparison of 6.0 Construction Contract Administration Phase</b>	
<b>Sequence and Scope of Services Chart 1</b> <b>(from current Tariff)</b>	<b>Sequence and Scope of Services Chart 2</b> <b>(Market Multiple-Residential Sector)</b>
<b>Coordination of Normal Engineering Services</b>	
• Structural Inspection/Field Review Reports	
• Mechanical Inspection/ Field Review Reports	
• Electrical Inspection/ Field Review Reports	
• Certification of Progress	
• Letters of Assurance	
	○ <i>Maintain Record of Revisions to Construction Documents</i>
Record (As-Built) Drawings	○ <i>Preparation of As-Built Drawings</i>
<b>Special Consultants' Services</b>	○ <i>Coordination of Special Consultants (e.g. Traffic, Environmental, Building Code Equivalencies, Surveyor, Geotechnical)</i>
○ Civil Construction Inspection/Field Review	
○ Landscape Inspection/Field Review	
○ Detailed Cost Accounting	
○ Fire Protection Inspection/Field Review	
○ Acoustical Inspection/Field Review	
○ Building Code Equivalencies	
○ Certified Professional Service	
○ Building Envelope Professional Services	

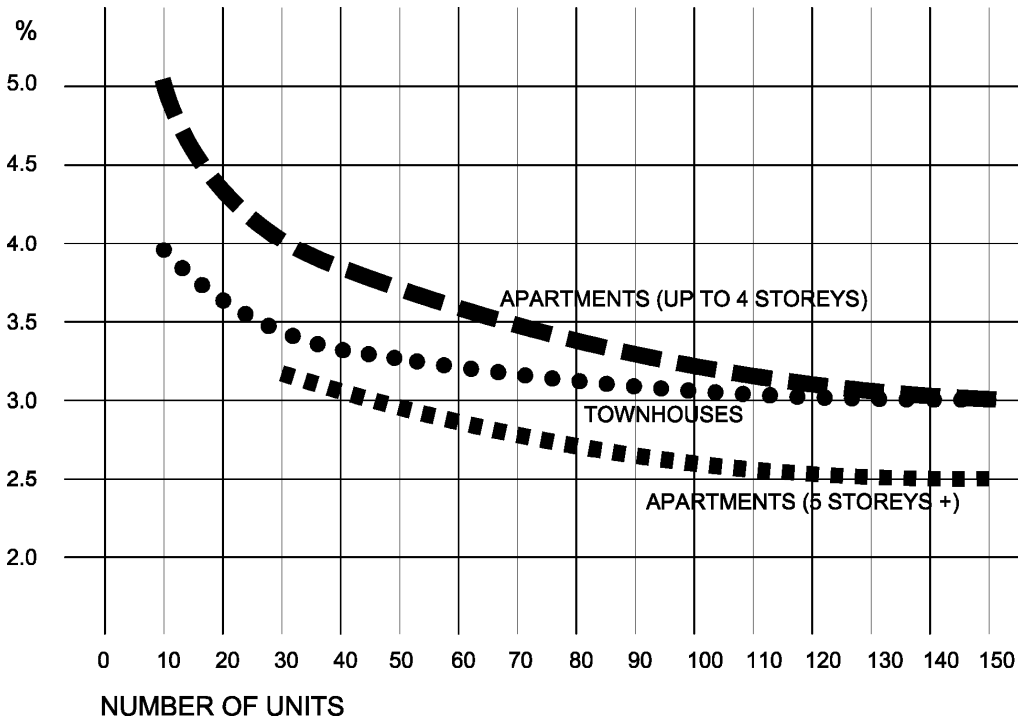
- Basic Services: normally provided as integrated set by architect under Standard Forms of Agreement; form basis of fees in section 3.5.3
- Additional Services: provided to meet specific project needs

<b>Sequence and Scope of Services Charts Comparison of 7.0 Post-Construction Phase</b>	
<b>Sequence and Scope of Services Chart 1 (from current Tariff)</b>	<b>Sequence and Scope of Services Chart 2 (Market Multiple-Residential Sector)</b>
	<b>7.1 Basic Services:</b>
	No Post Construction Services are Included in Basic
<b>Architect's Services</b>	<b>7.2 Additional Services:</b>
○ Project Inspection/Field Review	○ <i>Project Inspection/Field Review</i>
○ Deficiency Assessment	○ <i>Deficiency Assessment</i>
○ Instructions for Correction of Deficiencies	○ <i>Instructions for Correction of Deficiencies</i>
○ Start-up Assistance	○ <i>Start-up Assistance</i>
○ Services Provided After Substantial Performance Date	
	○ <i>Services Provided After Occupancy Permit</i>
○ Fine Arts/Crafts/Graphics/Non- Building Equipment Selection	○ <i>Fine Arts/Crafts/Graphics/Non- Building Equipment Selection</i>
○ Building Analysis and Reports	○ <i>Building Analysis and Reports</i>
Services Related to Alterations and Demolition	○ <i>Services Related to Alterations and Demolition</i>
○ Life Cycle Cost Monitoring	○ <i>Life Cycle Cost Monitoring</i>
○ Environmental Monitoring	○ <i>Environmental Monitoring</i>
○ Project Management	○ <i>Project Management</i>
○ Commissioning	○ <i>Commissioning</i>
○ Alternate Dispute Resolution Services	○ <i>Alternate Dispute Resolution Services</i>
○ Expert Witness Services	○ <i>Expert Witness Services</i>
○ Post-Occupancy Evaluation	○ <i>Post-Occupancy Evaluation</i>
	○ <i>Warranty Review or Report</i>
	○ <i>Coordination of Consultants</i>
<b>Coordination of Engineering and Special Consultants Services</b>	
○ Start-Up Assistance	
○ Services Provided After Substantial Performance Date	
○ Non-Building Equipment Selection	
○ Building Analysis and Reports	
○ Services Related to Alterations and Demolition	
○ Life Cycle Cost Monitoring	
○ Systems Performance Review	
○ Commissioning	

- Basic Services: normally provided as integrated set by architect under Standard Forms of Agreement; form basis of fees in section 3.5.3
- Additional Services: provided to meet specific project needs

## **Market-Multiple Residential: New Construction**

### **Recommended Net Percentage Fee for Basic Architectural Services in this Sector**



Note: The following assumptions apply to the use of this graph.

#### **Client**

These projects would be for private sector clients who have experience with this building type and who will have a reasonable reaction to the bureaucratic requirements that arise. Other variables would affect the fee upward, e.g. a novice developer; an institutional or bureaucratic management style; an argumentative approach, and a client without knowledgeable in-house field personnel.

#### **Authority Having Jurisdiction (Municipality, Regional District, et al)**

The user of this graph should be cautioned that the fees are for projects in a municipality familiar to the architect, and historically non-confrontational to the architect's proposals. The architect should consider the effort required for a project in a less familiar or an unreceptive municipality that would require an upward adjustment factor to account for the differences in bureaucracy, notwithstanding and in addition to travel time.

#### **Site**

The site is flat without significant environmental, geotechnical, or urban design issues. Complicating conditions would require appropriate fee-increase adjustments.

#### **Construction Cost**

The percentage-based fees are calculated against a Construction Cost which excludes the full, unrebated federal "Goods and Services Tax" (GST) or other, comparable value-added tax.

# Appendix II

## Sequence and Scope of Services Chart

(Market Multiple-Residential Sector)

1.0 Pre-design	2.0 Schematic Design	3.0 Design Development	4.0 Construction Documents	5.0 Bidding or Negotiation	6.0 Construction Contract Administration	7.0 Post-Construction
<p><b>1.1 Basic Services:</b> No Pre Design Services are Included in Basic</p> <p><b>1.2 Additional Services:</b></p> <ul style="list-style-type: none"> <li>○ Facility Programming</li> <li>○ Space Relationships</li> <li>○ Flow Diagrams</li> <li>○ Project Development/Scheduling</li> <li>○ Project Budgeting</li> <li>○ Life Cycle Cost Studies</li> <li>○ Economic Feasibility Studies</li> <li>○ Agency Consulting/Review/Approval</li> <li>○ Site Selection/Analysis/Utilization</li> <li>○ Environmental Studies</li> <li>○ Energy Studies</li> <li>○ Existing Facilities Surveys</li> <li>○ Client-supplied Data Coordination</li> <li>○ Project Management</li> <li>○ Presentations</li> <li>○ Marketing Studies</li> <li>○ Project Financing</li> <li>○ Special Studies</li> <li>○ Re-zoning Assistance</li> <li>○ <b>Project Promotion</b></li> <li>○ OCP/Zoning Review</li> <li>○ Obtain Consultants' Proposals</li> <li>○ Coordination of Special Consultants (e.g. Surveyor, Geotechnical, Environmental, etc.)</li> </ul>	<p><b>2.1 Basic Services:</b></p> <ul style="list-style-type: none"> <li>● Client-Supplied Data Coordination</li> <li>● Collect and Analyze Site Data</li> <li>● Review Land-use Regulations</li> <li>● Identify Urban Design Issues</li> <li>● Site Utilization Studies</li> <li>● Identify Rezoning, Development Permit, OCP Issues</li> <li>● Identify Regulatory Framework</li> <li>● Integrate Client Supplied Data (e.g. Survey, Geotech etc.)</li> <li>● Review Site Characteristics</li> <li>● Review Alternate Design Approaches</li> <li>● Architectural Schematic Design</li> <li>● Schematic Design Coordination</li> <li>● Drawings &amp; Documents</li> <li>● Client Consultation</li> <li>● Agency Consultation</li> <li>● Building Code Review</li> <li>● Coordination of Normal Consultants (e.g. Structural, Mechanical, Electrical, On-Site Civil, Landscape)</li> </ul> <p><b>2.2 Additional Services:</b></p> <ul style="list-style-type: none"> <li>○ Review Contracts or Methods of Project Delivery</li> <li>○ Financial Feasibility Study</li> <li>○ Statement of Probable Construction Costs</li> <li>○ Obtain Consultants Proposals</li> <li>○ Interior Design Concepts</li> <li>○ Special Studies; e.g. Future Facilities, Environmental Impact</li> <li>○ Special Submissions or Promotional Presentations</li> <li>○ Models or Perspectives</li> <li>○ Project Management</li> <li>○ Program and Budget Evaluation</li> <li>○ Value Analysis</li> <li>○ Building Envelope Professional Services</li> <li>○ Coordination of Special Consultants (e.g. Geotechnical, Environmental, Traffic, etc)</li> </ul>	<p><b>3.1 Basic Services:</b></p> <ul style="list-style-type: none"> <li>● Client-Supplied Data Coordination</li> <li>● Architectural Design Development</li> <li>● Design Development Coordination</li> <li>● Drawings &amp; Documents</li> <li>● Rezoning Submission *</li> <li>● Design Panel Submission *</li> <li>● Prepare Urban Context Material</li> <li>● Prepare Exterior Materials and Colour Board</li> <li>● Client Consultation</li> <li>● Agency Consultation</li> <li>● Building Code Review</li> <li>● Development Permit Submission</li> <li>● Coordinate Normal Consultants (e.g. Structural, Mechanical, Electrical, On-Site Civil, Landscape)</li> </ul> <p style="text-align: center;">* One Cycle of the Process</p> <p><b>3.2 Additional Services:</b></p> <ul style="list-style-type: none"> <li>○ Re Submissions or Extraordinary Revisions to Obtain Regulatory Approvals</li> <li>○ Statement of Probable Construction Costs</li> <li>○ Budget Review/Evaluation</li> <li>○ Certified Professional Service</li> <li>○ Building Code Equivalency Research</li> <li>○ Interior Design Development</li> <li>○ Special Studies Reports; e.g. Planning Tenant or Rental Spaces</li> <li>○ Promotional Presentations</li> <li>○ Models or Perspectives</li> <li>○ Project Management</li> <li>○ Value Analysis</li> <li>○ Building Envelope Professional Services</li> <li>○ Coordination of Special Consultants (e.g. Traffic, Environmental, Acoustical)</li> </ul>	<p><b>4.1 Basic Services:</b></p> <ul style="list-style-type: none"> <li>● Client-Supplied Data Coordination</li> <li>● Prepare Architectural Working Drawings for Building Permit Submission</li> <li>● Prepare Door, Window, Finish Schedules</li> <li>● Research Materials and Prepare Specifications</li> <li>● Document Checking and Coordination</li> </ul> <ul style="list-style-type: none"> <li>● Client Consultation</li> <li>● Agency Consultation</li> <li>● Building Code Review</li> <li>● Letters of Assurance</li> <li>● Coordinating Registered Professional Role</li> <li>● Assist with Building Permit Filing</li> <li>● Coordination of Normal Consultants (e.g. Structural, Mechanical, Electrical, On-Site Civil, Landscape)</li> </ul> <p><b>4.2 Additional Services:</b></p> <ul style="list-style-type: none"> <li>○ Statement of Probable Construction Costs</li> <li>○ Preparation of Project Budget</li> <li>○ Certified Professional Service</li> <li>○ Interior Construction Documents</li> <li>○ Interior Elevations</li> <li>○ Detailed Millwork Design</li> <li>○ Reflected Ceiling Plans</li> <li>○ Review of Form of Contract</li> <li>○ Alternate Bid Details &amp; Special Bid Documents</li> <li>○ Project Management</li> <li>○ Area Analysis</li> <li>○ Project Lease Plans</li> <li>○ Tenant Layout Drawings</li> <li>○ Multiple Contracts Management</li> <li>○ Phased Construction Management</li> <li>○ Building Envelope Professional Services</li> <li>○ Coordination of Special Consultants (e.g. Traffic, Environmental, Building Envelope Professional, Surveyor, Geotechnical)</li> </ul>	<p><b>5.1 Basic Services:</b> No Tender Services are Included in Basic</p> <p><b>5.2 Additional Services:</b></p> <ul style="list-style-type: none"> <li>○ Client-Supplied Data Coordination</li> <li>○ Coordinate Issue of Bid Documents</li> <li>○ Coordinate/Issue Addenda</li> <li>○ Bid Evaluation</li> <li>○ Evaluate Bidders Alternates</li> <li>○ Client Consultation</li> <li>○ Prepare Contracts</li> <li>○ Separate Bids or Negotiated Bids</li> <li>○ Services Related to Bidders' Proposals</li> <li>○ Respond to Bidders Inquiries</li> <li>○ Project Management</li> <li>○ Prepare Prequalification Criteria</li> <li>○ Pre-qualify Contractors</li> <li>○ Services as a Building Envelope Professional</li> <li>○ Coordination of Consultants</li> </ul>	<p><b>6.1 Basic Services:</b></p> <ul style="list-style-type: none"> <li>● Field Reviews to Ascertain Conformance with Construction Documents and Applicable Codes</li> <li>● Respond to Client's, Contractor's and AHJ's Inquiries and change requests</li> <li>● Interpretation of Construction Documents</li> <li>● Shop Drawing/Product Data/Sample Review</li> <li>● Site Instructions</li> <li>● Client Consultation</li> <li>● Letters of Assurance</li> <li>● Coordinating Registered Professional Role</li> <li>● Building Code Deficiency Assessment for Occupancy Permit*</li> <li>● Services for Building Commissioning as Defined in BCBC 98</li> <li>● Agency Consultation</li> </ul> <p style="text-align: center;">*One Assessment Report</p> <p><b>6.2 Additional Services:</b></p> <ul style="list-style-type: none"> <li>○ Administration of the Contract</li> <li>○ Progress Report Evaluation</li> <li>○ Substantial Performance Certificate(s) and Associated Deficiency Assessment</li> <li>○ Administration of Lien Holdback</li> <li>○ Certificates for Payment</li> <li>○ Interpretation of Contracts</li> <li>○ Interior Construction Inspection/Field Review</li> <li>○ Full-Time Project Representative</li> <li>○ Issue Change Orders or Change Directives</li> <li>○ Review of Warrantees</li> <li>○ Administration of Separate Contracts</li> <li>○ Project Management</li> <li>○ Promotional Material</li> <li>○ Record (As-Built) Drawings</li> <li>○ Certification re: Financing</li> <li>○ Alternate Dispute Resolution Services</li> <li>○ Certified Professional Service</li> <li>○ Multiple Contracts Management</li> <li>○ Phased Construction Management</li> <li>○ Building Envelope Professional Services</li> <li>○ Payment Certifier Role for Subcontracts (Lien Legislation)</li> <li>○ Maintain Record of Revisions to Construction Documents</li> <li>○ Preparation of As-Built Drawings</li> <li>○ Coordination of Special Consultants (e.g. Traffic, Environmental, Building Code Equivalencies, Surveyor, Geotechnical)</li> </ul>	<p><b>7.1 Basic Services:</b> No Post Construction Services are Included in Basic</p> <p><b>7.2 Additional Services:</b></p> <ul style="list-style-type: none"> <li>○ Project Inspection/Field Review</li> <li>○ Deficiency Assessment</li> <li>○ Instructions for Correction of Deficiencies</li> <li>○ Start-up Assistance</li> <li>○ Services Provided After Occupancy Permit</li> <li>○ Fine Arts/Crafts/Graphics/Non-Building Equipment Selection</li> <li>○ Building Analysis and Reports</li> <li>○ Services Related to Alterations and Demolition</li> <li>○ Life Cycle Cost Monitoring</li> <li>○ Environmental Monitoring</li> <li>○ Project Management</li> <li>○ Commissioning</li> <li>○ Alternate Dispute Resolution Services</li> <li>○ Expert Witness Services</li> <li>○ Post-Occupancy Evaluation</li> <li>○ Warrantee Review or Report</li> <li>○ Coordination of Consultants</li> </ul>

● Basic Services: normally provided as integrated set by architect under Standard Forms of Agreement; form basis of fees in section 3.5.3  
 ○ Additional Services: provided to meet specific project needs