



Architect/Designer selection process for Fit-out Projects V5

CIRE, Design of the built environment



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Roche fit-out procurement models

Three procurement models to select from, based on complexity and scope of the project

1. Single-Stage Design & Build

Recommended for projects with any or all of the following characteristics:

Low complexity
Under 500m2 in size
Limited scope renovation
Location with available local design
resources

Corresponding to the Global Architect Involvement level 1 (light)

2. Design & Build with Concept Designer

Recommended for projects with any or all of the following characteristics:

Medium complexity
Between 500m2 and 2000m2 in size
Full scope fit out or significant
refurbishment
Location with limited local design
resources

Corresponding to the Global Architect Involvement level 2 (typical)

3. Traditional

Recommended for projects with any or all of the following characteristics:

High complexity Over 2000m2 in size Full scope fit out or significant refurbishment

Corresponding to Global Architect Involvement level 2+ SME



Selection process under the Traditional and Single-stage D&B procurement models



Process steps

1

Define Architect / Designer Profile

By project team Dia Corporate Architect

5

Evaluation Matrix Revise and agree

All together

2

Define Selection Criteria

By project team
Dia Corporate Architect

6

RFP Prepare documents and send

By Technical Project Manager (TPM)

3

Compile Longlist > RFI

By project team Dia Corporate Architect 4

Longlist evaluation
> Shortlist

All together

7

RFP Evaluation
> Recommendation

All together

8

Endorsement by CA Approval by SC

By Dia Corporate Architect By Steering Committee



Architect profile

Architect's profile is to be defined based on project-specific requirements at project kick-off by the Project Team

Focus on outcome > Set-up flexibility depending on:

■ Market situation → Good Capabilities

Design Expectations \rightarrow High

ightarrow Specific program ightarrow Office / Parking

ullet Local team capabilities igtharpoonup No

ullet Timeline ullet Critical/Lease

ullet Budget ullet Design to cost

• Level of complexity: Medium

project size, requirements \rightarrow BIM pilot, New office + fit-out existing



Selection criteria

Fixed, general criteria:

- C1* Alignment with Roche Design Guidelines (Corporate Identity)
- C2* Conceptual strength
- C3 Ability to interpret and reflect context and cultural inputs into the project specific design
- C4 Design methodology and flexibility: client engagement, systematic project development
- **C5** Specific program experience
- C6 Office base location

^{*} These criteria will be a "must", eliminatory criteria if no compliance, to ensure architectural capability



Selection criteria, project specific

Project specific criteria:

- Efficient construction systems
- Understanding of WPS and capability to incorporate WPS principles into design.
- Ability to deliver whole package of tender drawings (incl. Interior and MEP)
- Quality of execution, detailing.
- Construction onsite support.
- Sustainability, etc...

These and other criteria may be added depending on the information available / requested (RFI, test-fit layout, project vision, etc...) and specific project requirements.



Assessment

Depending on the project, **designer's capabilities** can be assessed through:

- Company's profile
- Previous projects experience / Portfolio / Case Studies
- Proposed Project Team
- Methodology of work
- Project vision (required only for projects of considerable size or relevance)
- Interview
- RFI return

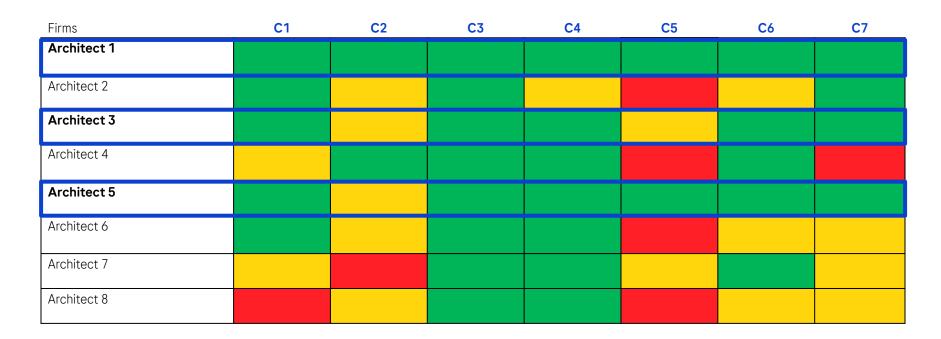


Longlist

Architect 1 https://blocherpartners.com/en	Architect 2 https://blocherpartners.com/en	Architect 3 https://blocherpartners.com/en	Architect 4 https://blocherpartners.com/en			
Architect 5 https://blocherpartners.com/en	Architect 6 https://blocherpartners.com/en	Architect 7 https://blocherpartners.com/en	Architect 8 https://blocherpartners.com/en			



4. Longlist evaluation



Green: Fully met Orange: Partially met Red: Not met



Architect selection process Shortlist recommendation

	•		
Architect 1 https://blocherpartners.com/en		Architect 3 https://blocherpartners.com/en	
Architect 5 https://blocherpartners.com/en	Architect 6 https://blocherpartners.com/en		



RFP - Evaluation matrix

Total

	D & B Selection	Evaluation Matrix				
					7/19/2019	
otes:	Abbreviations listed across the header of each bidder evir responses: DSC - Global Architect, Roche PM - Roche Local					
	This evaluation is developed based on information requestions are submitted by bidders, except commercial quotation which we see the second seco				documents	
	3. Evaluation criteria are listed in column B followed by a de	tailed description in colun	nn C			
	4. Each criteria (from B to E) should be graded on a 1 to 5	point spread, 5 being the	highest score.			
	5. Only yellow coloured boxes are to be edited					
	6. Barring unforeseen circumstances, the contract will be aw	arded to the firm with the	highest cumula	tive score.		
	7. If any changes are sought, please align with Corporate A	Architect team or Global Ex	pert Program M	anagement.		
Code	7. If any changes are sought, please align with Corporate A	Architect team or Global Ex Allocated Weightage	pert Program M. Bidder 1	anagement. Bidder 2	Bidder 3	Bidder 4
Code		Allocated			Bidder 3 Weighted Score	
Code		Allocated	Bidder 1 Weighted	Bidder 2 Weighted	Weighted	Weighted Score
	Evaluation Criteria	Allocated Weightage	Bidder 1 Weighted Score	Bidder 2 Weighted Score	Weighted Score	Weighted Score
A	Evaluation Criteria Administration	Allocated Weightage fully confirmed or not	Bidder 1 Weighted Score confirmed	Bidder 2 Weighted Score confirmed	Weighted Score confirmed	Weighted Score confirme
A B	Evaluation Criteria Administration Design & Creativity	Allocated Weightage fully confirmed or not	Bidder 1 Weighted Score confirmed	Bidder 2 Weighted Score confirmed	Weighted Score confirmed	confirmed

100

13

12

_	Administration	Administration points are examining and each DSE company non- Geographic			Bilder's			_	
		and the same of th			Easter 1				
	Guarandee period (months)								
	form of contract	Spedar causes (Chosed budget = Delivery timing guaranteed							
	Souhe payment term	Acceptance of Scotte payment terms							
	Penalty system								
	Insurane	Professional indexestly insurence							
	Userding	Licence, 15th certification							
	finance stability	Provide annual tumover							
	Compliance with local health and carrier								
	(Newson's				Roche				
			Recommended Weighting		Project Seam				Comment
	Design & Creativity		40					2.47	
	Aligament with Forthe Global Guidelines	Design compliance with Souths interfer design guidelines/principle/paper/borities. Lote and fixed refects conjusted principle and sudder receivable organisms to statiff and wastern. Execute this wellbeing placements incorporated.			NA	N/A			
	Conceptual interespts	Clear and combiletels design covered. Sinking the proof. Most Strandscore, Youndation driving the design, gaving the proof. design for the country. Security in Interpretation of contact and basel outliers in denign. Cle thy of on cospitual their king proving.			NA	NA			
	Design methodicingy	Clears engagement and selfs methodology, sustainable design development approach, determinable description, qualify control. Methods of waxaging design sharages, design updates. controllation.			NA	N/A			
	Quality of defailing and documentation	The rough and comprehensive surstruction dissuments, high quality of design details.			NA	N/A		۰	
	Alignment with Newtylese Shakegy and functional requirements	Appropriate with Yelf's report, Note Cong Wiff's recommendations of analysis based with the part fine billing in weight in disease. Freedings and report requirements are lined, greating a particular & billion and such place.		,	,		1.7	2.7	
	Management and technical capabilities		10					6.5	
	Company Corporato Profile	Size, plobal presence, year of establishment, general market regulation					2.9	0.5	
	ATP return completion and conformity	Verfiel against RFP submission drovilat		N/A			4.0	9.6	
	Local cody compliance	Comcessate familiarity with local construction codes		5/4		5	43	0.9	
	Construction information	Site continuous and support during construction; management of observated changes		N/A	3		3.5	9.7	
1	Ratevant Experience								
	Office fit-out experience in given local	Relevant office fit-out experience, recently completed projects immorrantly in size; simple respensation in a plus	2				1.3	4.0	
	Scales experience	Earlie cups toncy (EDA/Hyama), References previded, Scottack. Reporteror with design of program according by LRRC, VVI,				4		0.3	
	Continuedition and find property (1990) William BROSSMI., 1	bellet ex.		104					
4	Delivery Team 1988 Project Planager	Proposed team ergenization structure, defined toles and)					4.5	
		Anoposed team organization intruture, defined ness and responsibilities. Undersite niling at Project Objectives, Associaments & Sic Interestics, Josef presence, Soche aspecienza Experience, simplement in this project, specific intreast project.							
	beign used	Representative of the parties of the						8.3	
	MEP angineer Accustic originaer							1.3	
	You susinglish	experience Customor Folius à Communication, Contract despassore, presentation clarity, in cerson intendese.						8.3	
2	Werk McDeckropy	arcaerisches, darche, in serson interdent							
	Navier schedule	Eatlandily and alignment with Eache design and 18 aut process							
	Pojod Management	Project Management: Commitment to quarte, costs, and timetimes. Coordination appointing of design fears, subcontractors, and vendo to.	2	N/A			0.0	0.0	
	Commercial fee	only assess the total	34						
	Design fee			5/4	NA	N/A			Heave indicate th
	Build No.			5/4	NA	NA			Please indicate th
	Transparent billing system	To be taken into consideration		94	N/A	N/A			
	Tetal		31	504			0.6		
	Combraction capabilities								
	Construction manager	Euge denne B. brussindige, involvement in this amijnut, specific relevant properties appropriately communication. Combinetics of 20100015 in Statemen.	,	N/A			0.0	1.0	
	Communical method physiometri	Construction work methods, proposed sits arrangement,	2	N/A			0.6	1.0	
		Management, weekers management, etc. Fatureatty and angement of conduction of selection with master.							
	Construction schedule	conduction organizary, malental in anagement, legislate, substy management, which can hadomically as Extending and also make or construction careaction with installar wheelule. Allow with pronoursement is deliber to behalde, management is explored state, 45. Analysis of proper specific critical leaves and largement and Analysis of graphs specific critical leaves and largement of construction activities, with responsible in Science.	2	5/4			0.0	0.0	
	Project specific focus	construction extention, with manufacture in receivers.		6/4.			0.0	0.0	
	Choice of patterns in 10 nothing Appendix to out-contractors, Management of naminated parties.	Appropriate methodology on management and attendance of sommatical parties: landout, normatical corresponding values.	2	N/A			0.0	1.0	

* Best practise template available



Roles & responsibilities

		ROLES								
Architect Selection Process	Diagnostics Corporate Architect	Technical Project Manager	Roche Procurement	Local Roche Team						
1. Profile Definition in line with PEP	R,	R, A	С	R						
2. Define Selection Criteria	R	R, A	С	R						
3. Compile Longlist	R	R,A	С	С						
4. Evaluate Longlist > Shortlist	R	R, A	1	R						
5. Define RFP Evaluation Matrix	С	R, A	С	С						
6. Prepare RFP Documents	С	R, A	R	С						
7. RFP return evaluation > recommendation	R	R, A	R	R						
8. Endorsement *	R, A	I	I	T I						

^{*}Appointment to be approved by Steering Committee, according to project DoA

R. Responsible A. Accountable C. Consulted I. Informed



Selection process under the Two-stage D&B with Concept Designer procurement model



Process steps

1

Shortlist designers for a tender

Dia Corporate Architect

2

Refine Selection Criteria

Project team
Dia Corporate Architect

3

Evaluation Matrix Revise and agree

All together

4

RFP Prepare documents and send

Technical Project Manager (TPM)

5

RFP Evaluation > Recommendation

All together

6

Endorsement by CA
Approval by SC

By Dia Corporate Architect By Steering Committee



Architect shortlist

Concept designers are shortlisted based on project-specific requirements from a list of Global Design Partners, who have been confirmed to meet Base Selection criteria

Focus on outcome > shortlist based on: Location Market situation Low local market capabilities Design Expectations High Specific program Office Local team capabilities No Timeline Critical / Lease Budget Design to cost Medium Level of complexity: project size, requirements New office / fit-out existing



Selection criteria

Project specific criteria may include several of the following:

- **C1** Proposed project team
- **C2** Execution strategy and methodology
- **C3** Base location experience
- **C4** Availability of onsite support

^{*}Other criteria may be added depending on the information available / requested, and specific project requirements.



Assessment

Concept Designer candidates for a project can be assessed through:

- Company's profile
- Previous projects experience / Portfolio / Case Studies
- Proposed Project Team
- Proposed execution strategy and methodology of work
- Alignment with timeline
- Interview
- Financial offer



RFP - Evaluation matrix

	Concept Designer S	election Evaluati	ion Matrix					Administratio	on points are mandatory and each D&B compa	ny needs to co	nfirm that	they fulf	fil this req	uiremen	ts.		
							Α	Administration	Description			Bio	dder`s inf	0			
					6/23/2021			Guarantee Project Schedule	Acceptance of proposed Project Timeline								
	1. Abbreviations listed across the header of				and the			Team Structure	Proposed project team structure, Lead Designer,								
ites:	evaluation of the RFP responses: DTR - Glot Technical Project Manager for the given proj	bal Architect, Roche PI					Cod		etc. whether align with pre-qualification stage. Description	Recommend ed Weighting			Procur	ТРМ	Average Score	Weighted Score	Comn
	2. This evaluation is developed based on inf						D	Project Delivery		50		Team	ement		Score	0.0	200
	be scored based on documents submitted b will be scored after the final quotation is rec		w, except cor	mmercial quot	tation which		В	Project Delivery	Relevant office fit-out experience in the local market and experience with 2-stage	30						0.0	
	3. Evaluation criteria are listed in column B	followed by a detailed	description i	n column C				Relevant fit-out experience	procurement model.	10	N/A		N/A	0,	0.0	0.0	
	4. Each criteria (from B to C) should be gra	aded on a 1 to 5 point	spread, 5 bei	ing the highe	st score.				5:Have both local experience and procurement model experience 3:Either local experience, or procurement model								
	5. Only yellow coloured boxes are to be																
	6. Barring unforeseen circumstances, the co	ontract will be awarder	d to the firm	with the high	est cumulativ	e score.			Whether proposed delivery team structure is efficient and reasonable, aligned with procurement strategy. 5: Team structure is efficiency and reasonable					4.			
	7. If any changes are sought, please align w Management.	with Corporate Archite	ct team or Gl	obal Expert P	rogram			Delivery Team structure, lead designer, etc		10			N/A		0.0	0.0	j
									Team structure is acceptable Team structure is un-reasonable and								
ode	Evaluation Criteria	Allocated Weightage	Bidder 1	Bidder 2	Bidder 3	Bidder 4		Communication with local	Impression of the proposed team and main contact person, based on the interview								
San S		weightage	S-100-100-100-100-100					team 5: Good	5: Good	10	N/A		N/A		0.0	0.0	
			Weighted	Weighted	Weighted	Weighted			3: Average 1: Bad								
			Score	Score	Score	Score			Rationality and alignment with project master schedule								
Α	Administration	fully confirmed or not	confirmed	confirmed	confirmed	confirmed		Master schedule	5: Project schedule is aligned and includes detailed breakdown 3: Project schedule is aligned but doesn't include detailed breakdown	20	N/A		N/A		0.0	0.0	
В	Project Delivery	50	0	0	0		С	Commercial fee	1: Project schedule is not allianed with master	50						0.0	
С	Commercial fee	50	0	0	0		-	Design fee	Score for Lowest Quotation:5	46	N/A	N/A		N/A		0.0	Please inc the fee
								Submission of Proposal -on time	5-on time in all rounds of submission; Deduct one point for delay in any round of	2	N/A	N/A		N/A		0.0	
	Total		0	0	0	0		Submission of Proposal-	submission. 5-No mistakes in proposal/quotation								
								quality	5 TO THIS CAPE OF STORY QUOTESTON	2	N/A	N/A		N/A		0.0	
								Total		100						0.0	

^{*} Second Stage tender takes place after completion of Concept Design+. D&B is selected from from a list of TPM-recommended vendors. Best practise templates available.



Roles & responsibilities

	ROLES								
Architect Selection Process	Diagnostics Corporate Architect	Technical Project Manager	Roche Procurement	Local Roche Team					
1. Profile Definition in line with PEP	R	R, A	С	R					
2. Compile Shortlist	R	R, A	I	R					
3. Define RFP Evaluation Matrix	С	R, A	С	С					
4. Prepare RFP Documents	С	R, A	R	С					
5. RFP return evaluation > recommendation	R	R, A	R	R					
6. Endorsement *	R, A	I	I	I					

^{*}Appointment to be approved by Steering Committee, according to project DoA

R. Responsible A. Accountable C. Consulted I. Informed

