

Applicant Name: \_\_\_\_\_ Date: \_\_\_\_\_

### OVERVIEW

In each of the following categories, provide commentary and specific examples of how you have built and display these competencies over the course of your career. Use the following as the guide for self-assessment.

### TECHNICAL COMPETENCIES

A minimum score of 3 is required for each category.

The scoring system for applicant's abilities in technical aspects of their work is:	
Level #	Description
<b>0</b>	Little or no exposure to the competency
<b>1</b>	Training required – general appreciation and awareness of the competency is required
<b>2</b>	Requires knowledge and understanding of objectives – uses standard interior design methods and techniques in solving problems
<b>3</b>	Carries out assignment of moderate scope and complexity – is typically seen to be prepared to assume interior design responsibilities
<b>4</b>	Carries out responsible and varied assignment requiring general familiarity with a broad field of interior design and knowledge
<b>5</b>	Uses mature interior design knowledge, independent accomplishments, and coordination of difficult and responsible assignments

### REQUIRED COMPETENCIES

1. Functional Programming
2. Site and Building Analysis
3. Schematic Design
4. Space Planning
5. Design Development
6. Consultant Coordination
7. Cost and Budget Analysis
8. Building Codes – Standards, Variances and Bylaws
9. Project Coordination and Contract Documents
10. Building and Permitting Process with Authorities Having Jurisdiction
11. Tender Call and Analysis, Construction Contracts and Contract Award
12. Contract Administration
13. Project Management
14. Office Management
15. Professional Practice

## 1. FUNCTIONAL PROGRAMMING

<b>Description:</b>	Understand, document, and confirm the client's and stakeholders' goals and objectives, including design outcomes, space needs, and needs for specific or measurable outcomes. Collect data from client and stakeholders by engaging in programming, surveys, focus groups, charrette exercises, and benchmarking to maximize design outcomes and occupant satisfaction. Understand the blocking and stacking plan.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Project documentation confirming project understanding, goals, objectives, outcomes, project budget and needs</li> <li>b. Data collection from surveys, focus groups, charrette exercises</li> <li>c. Evaluating detailed solutions for client / user group program needs</li> <li>d. Space audit reporting</li> <li>e. Development and the preparation of a draft functional program</li> <li>f. Evaluating detailed solutions for client / user group program needs through stacking and blocking plan</li> <li>g. Final functional program</li> </ul>

**Applicant commentary:**

	0	1	2	3	4	5
<b>Applicant's Self-Assessment Competency Level</b>						
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## 2. SITE AND BUILDING ANALYSIS

<b>Description:</b>	Evaluate, assess, and document existing site conditions and site measurements.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Reviewing, assessing, and documenting site conditions and conducting site analysis (example, barrier free conditions, etc.)</li> <li>b. Preparing site and building analysis reports</li> <li>c. Conducting site measurements and taking photographs</li> </ul>

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### 3. SCHEMATIC DESIGN

<b>Description:</b>	Includes relationship diagrams, matrices, bubble diagrams, blocking and stacking diagrams, and fit plans. Preliminary building codes, project schedule and budgets are considered. Application of creative and innovative thinking that interprets collected project data and translates a unique image or abstract idea as a design concept, the foundation of a design solution. The concept is then described using visualization and communication strategies.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Conducting analysis of design principles and solutions in relation to functional programming assessments</li> <li>b. Undertaking preliminary building code reviews</li> <li>c. Preparing initial high-level budgeting</li> <li>d. Undertaking image visualization sessions and workshops with clients</li> <li>e. Researching and evaluating aesthetics of design</li> <li>f. Rough sketching, hand renderings and drawings to convey schematic design</li> <li>g. Developing relationship diagrams, matrices, bubble, stacking and blocking diagrams and test fit plans as they relate to the building and its conditions</li> <li>h. Schematic design plans, presentation, or report</li> </ul>

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#### 4. SPACE PLANNING

<b>Description:</b>	Preparation of preliminary space plan for client review and sign-off. Interpreting the collected data in the functional programming and developing a code-compliant graphics plan that defines circulation patterns showing how people move through the space and relate to each other or each group.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Preparing preliminary building code analysis</li> <li>b. Space planning logic – bubble diagrams to presentation plan</li> <li>c. Sign-off from client</li> <li>d. How the space plan was resolved in response to client comments</li> </ul>

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## 5. DESIGN DEVELOPMENT

<b>Description:</b>	Research products, materials, and finishes, furniture, furnishings, equipment signage, window treatments, interior elements, components, and assemblies, based on client and occupant needs, project budget, maintenance and cleaning requirements, lifecycle performance, sustainable attributes, environmental impact, installation methods, and code-compliance. Develop the image / vision through design presentations with drawings, elevations, sketches, renderings, modelling. Refinement of the budget based upon design development.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Research, analysis and assessing factors influencing design development</li> <li>b. Assessing engineering systems and regulatory factors</li> <li>c. Developing refined solutions that respond to the factors influencing the design</li> <li>d. Developing alternatives in finalizing a detailed solution</li> <li>e. Design documentation (plans, elevations, sketches, renderings)</li> <li>f. Coordinating engineering consultant documentation (i.e., structural, electrical and mechanical engineers)</li> <li>g. Preliminary budgeting</li> <li>h. Design development presentation and report</li> </ul>

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## 6. CONSULTANT COORDINATION

<b>Description:</b>	The scope of work may require the expertise of allied design professionals and consultants. This may include the work of architects, mechanical, electrical, structural, and fire-protection engineers and designers, acoustics, audio / visual, low-voltage, food service, medical and dental equipment, commercial kitchen design, sustainability, security, technology and other specialty consultants as it relates to the building, project requirements, building code and life safety. As a prime consultant, the role and responsibility include the coordination and management of all consultants.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Understanding the role and responsibility of a prime consultant</li> <li>b. Understanding building systems and their influence on design and sustainability</li> <li>c. Managing communications, providing direction, and coordinating consultants throughout the entire project; reviewing and coordination of consultant work</li> </ul>

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## 7. COST AND BUDGET ANALYSIS

<b>Description:</b>	Oversee the development of third-party budgets, direct involvement in project budgets, construction budgets and furniture budgets to provide analysis, alternatives cost savings and recommendations. Ability to establish and assess budgetary constraints and to contribute to value engineering.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Understanding factors influencing project, construction, and furniture budgets</li> <li>b. Preparing budgeting / specifications for project pricing</li> <li>c. Attaining budget and cost analysis from third-party cost consultants, contractors, and furniture suppliers</li> <li>d. Understanding the difference between a project budget and a construction budget</li> <li>e. Knowledge of different methods used to develop project budgets</li> <li>f. Understanding how the type of project delivery affects the budgeting</li> <li>g. Understanding of value engineering</li> <li>h. Understanding lifecycle costing principles</li> <li>i. Understanding availability of labour and materials, and their impact on budgets</li> <li>j. Updating and refining project budgets and project progresses</li> <li>k. Understanding project and construction contingencies and the management of these aspects as the project progresses and risks identification and mitigation</li> </ul>

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## 8. BUILDING CODES – STANDARDS, VARIANCES AND BYLAWS

<b>Description:</b>	An interior design project must be compliant with applicable building codes, fire codes, life safety and energy codes. In addition, they must follow provincial and national standards, regulations, and legislation (applicable Acts). They must also follow the processes defined within the bylaws and legislation governing the authorities having jurisdiction.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Understanding the national, local building codes, standards, regulations, and bylaws as they apply to the project</li> <li>b. Building code analysis used for building permit</li> <li>c. Awareness of alternate solution provisions in national and local building codes</li> <li>d. Applying energy-related code requirements to a project</li> <li>e. Applying barrier-free requirements to a project</li> <li>f. Understanding when variances are required, where to apply</li> </ul>

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## 9. PROJECT COORDINATION AND CONTRACT DOCUMENTS

<b>Description:</b>	Coordinate and develop contract documents for the purposes of communicating design, obtaining a building permit, and issuance of tender. Continued discussions and review meetings with owner, client, landlord, consultants, product vendors / representatives and authorities having jurisdiction.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Preparing or coordination of contract documents including working drawings, specifications, project manual and professional schedules – communicate, advise, direct, and review</li> <li>b. Understanding, editing of a project manual, including the invitation to bid, bid forms, general conditions, supplementary conditions, summary of work, general requirements, and applicable specifications</li> <li>c. Understanding difference between prescriptive and performance specifications</li> <li>d. Final review for building code</li> <li>e. Sub-consultant coordination and review, coordinating all documents, professional schedules, communications</li> <li>f. Effective communication throughout the project (involving meetings with the owner, client, landlord, consultants, authorities having jurisdiction, contractor / construction manager, product representatives and other consultants).</li> <li>g. Issuance of building permit drawings, project manual, professional schedules</li> </ul>

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## 10. DEVELOPMENT AND BUILDING PERMITTING PROCESS WITH AUTHORITIES HAVING JURISDICTION

<b>Description:</b>	An interior design project must be compliant with municipal zoning, changes to a building that may require development permit application. The law states that projects must have building permit prior to a contractor starting construction. Designers must provide documentation for these applications and coordinate the consultants. Designers may also apply on behalf of the owner for each of these applications.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Understanding of when a development permit is required, the documentation required and the application process for a development permit</li> <li>b. Understanding when a building permit is required, documentation required and the application process for a building permit</li> <li>c. Understanding when professional involvement is required for development and / or building permits</li> <li>d. What happens when there is a change in the professional involvement</li> <li>e. Understanding the actions required when a site is not code-compliant</li> <li>f. Knowing the types of documents where a professional stamp is required and when</li> </ul>

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## 11. TENDER CALL AND ANALYSIS, CONSTRUCTION CONTRACTS AND CONTRACT AWARD

<b>Description:</b>	Contract documents (working drawings issued for tender and contract manual) are the main documents used for a tender call. The Canadian Construction Document Committee (CCDC) provides standardized construction contracts for use between the owner and contractor. Knowledge of the different types are key to a tender call. During the tender call, general contractors may request site visits and submit queries seeking clarifications that may require issuance of addenda during the tender call. Once the bids are submitted, an analysis is required, and recommendations are made to the owner.
<b>Describe evidence of:</b>	<ol style="list-style-type: none"> <li>Understanding the types of construction contracts from CCDC, including benefits, purpose, and obligations</li> <li>Understanding different types of tender calls (public, invited)</li> <li>Issuing clarifications, addenda, alternate product</li> <li>Site walkthrough</li> <li>Evaluating bids submissions and coordination of evaluation with consultants and preparation of a tender analysis</li> <li>Understanding the application process for considering and awarding construction contracts</li> <li>Issuance of award letters</li> </ol>

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## 12. CONTRACT ADMINISTRATION

<b>Description:</b>	Administration of the contract as the owner's agent, including contract review, start-up meetings, site meetings, shop drawing review and submittals, change documentation, RFIs, review of contractor payment applications, issuance of certificate for payment, field observation, inspections, substantial performance inspection and letter, final inspection and inspection report, warranty review, coordination and project closeout.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Contract review, construction schedule review</li> <li>b. Start-up meeting and minutes</li> <li>c. Owner, landlord, contractor, consultant coordination</li> <li>d. Shop drawing and submittal review and coordination</li> <li>e. Change documentation – RFIs, clarifications, contemplated / proposed notice of changes, change orders, coordination of consultants</li> <li>f. Site meetings and minutes, field reports</li> <li>g. Review progress claims, consultant coordination, understanding of statutory declaration, WCB, holdback and preparation of certificate for payment</li> <li>h. Understanding of inspection for substantial performance, issuance of the letter and the lien act</li> <li>i. Final inspection and preparation of deficiency list</li> <li>j. Understanding of funds retention for deficient work</li> <li>k. Closeout documents</li> </ul> <p><b><i>Alberta Builders Lien Act</i></b></p> <ul style="list-style-type: none"> <li>l. The Province of Alberta has instituted the <i>Builders Lien Act</i>. Describe your understanding of the <i>Builders Lien Act</i>.</li> <li>m. What is a holdback and its purpose?</li> <li>n. What is the retention period?</li> </ul>

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### 13. PROJECT MANAGEMENT

<b>Description:</b>	Management of project communications and coordination with stakeholders, owner, landlord, consultants, suppliers, vendors, general contractor, project schedule, construction schedule, budgets, contracts, permits, resources, and project team members.
<b>Describe evidence of:</b>	<p>Project management occurs throughout the entire project. Provide the following:</p> <ul style="list-style-type: none"> <li>a. Understanding the client / interior designer agreements, responsibility of a client, and the responsibility of a designer</li> <li>b. Experience with different types of project delivery</li> <li>c. Understanding the role and responsibility of a prime consultant</li> <li>d. Experience in budgeting</li> <li>e. Developing project schedules and critical paths</li> <li>f. Understanding risk management and implementing mitigating strategies</li> <li>g. Understanding effective conflict resolution</li> <li>h. Coordination</li> </ul>

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## 14. OFFICE MANAGEMENT

<b>Description:</b>	Management of the office is critical in running an efficient and profitable firm. These areas of business are key to a successful interior designer: marketing, business development, financials, human resources, risk management, and general operations.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Different types of fee letters, fee schedules, client contract</li> <li>b. Insurance, risk management</li> <li>c. Understanding of Alberta Labour Standards</li> <li>d. Budgeting, financials, forecasting</li> <li>e. Client confidentiality</li> <li>f. Financials, invoices, marketing, business development</li> </ul>

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## 15. PROFESSIONAL PRACTICE

<b>Description:</b>	Understand legal, professional, and ethical obligations and scope of a Licensed Interior Designer, as a member of a self-governing profession, including competency and conduct requirements.
<b>Describe evidence of:</b>	<ul style="list-style-type: none"> <li>a. Understanding the <i>Architects Act</i></li> <li>b. Understanding the Alberta Association of Architects' Code of Ethics</li> <li>c. Understanding of key practice bulletins, especially <i>PB-26 Professional Involvement on Building Projects</i></li> <li>d. Know where to find the practice bulletins and understand why they are important for the professional to know them</li> <li>e. Benefits of becoming licensed</li> <li>f. Professional liability insurance</li> <li>g. Continuing education / professional development</li> </ul>

**Applicant commentary:**

	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
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## DECLARATION

I declare that the information provided in this Competency Self-Assessment Worksheet is true and correct to the best of my knowledge and knowing that it is of the same force and effect as if made under oath and by virtue of the [Canada Evidence Act](#).

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Date

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Name (please print)

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Signature

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### NOTES:

- This completed worksheet must accompany the Application for Assessment. Failure to include this worksheet will result in processing delays.

FOR OFFICE USE ONLY	AAA ID Number:
	AAA Approver Name:
	AAA Approver Initials: