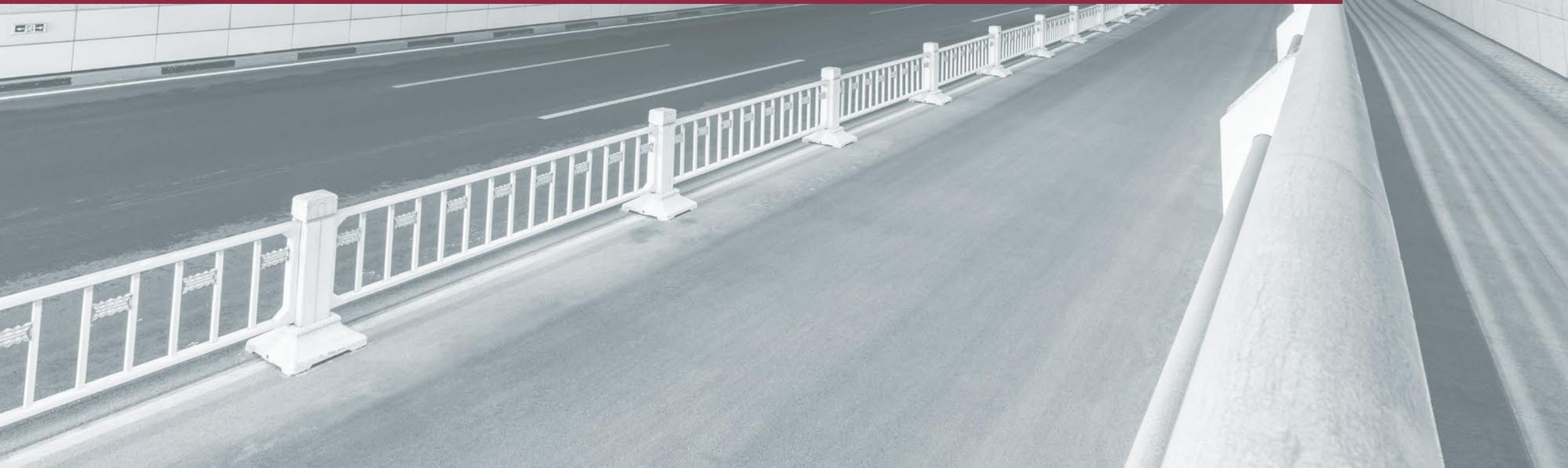


QBS Bootcamp





Procuring Engineering & Design Services Using Qualifications-Based Selection



What is Qualifications-Based Selection (QBS)?

QBS is a simple and competitive process that matches the right architecture and design professional to your project, based on expertise and experience rather than cost alone.

The use of QBS ensures that the procurement process engages the most experienced and most qualified firms at a fair and reasonable price. QBS is used by all federal agencies*, 46 state governments, and many localities around the country.

*In 1972, Congress adopted the Brooks Act (P.L. 92-582), requiring the use of Qualifications-Based Selection (QBS) for the procurement of architect and engineering services.

What does QBS Evaluate?



EXPERIENCE



EXPERTISE



TRAINING



AVAILABILITY



REFERENCES

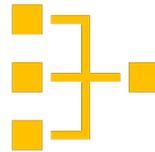
Why QBS over other procurement methods?



QBS saves **money**



QBS saves **time**



QBS **simplifies** complex projects



QBS **delivers** innovation



QBS **drives** procurement

QBS Saves Money



KEY FACTS

When it comes to saving money, QBS outperforms the national average by keeping projects on budget.

- Cost growth on projects where QBS was used to procure engineering services was half the national average (3 percent versus 6 percent).
- The perception that QBS procurement's focus on qualifications results in higher design fee costs has been shown to be incorrect.
- Devoting more design effort can reduce the project's final cost from early estimates by solving construction problems during the design phase when the costs are lower than after construction has commenced.

QBS Saves Time

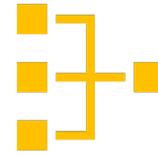


KEY FACTS

QBS procurement results in fewer project delays and improves the likelihood of owner satisfaction with the overall project. QBS outperforms the national average by keeping projects on schedule.

- Hiring the most experienced and qualified design team reduces project schedule growth as compared to the national average (7% growth versus 10% growth).
- A recent study showed that about half (48%) of QBS projects met all construction milestones with no adjustment in schedule required. Conversely, only 32% of non-QBS projects had the same performance. This is a 50% increase in the number of projects that met all schedules.
- Teams with greater experience working together, and in the same sector, consistently produced more complete documents that resulted in fewer delays during the construction process.
- There is a strong association between the use of QBS, the quality of construction documents developed by the design team, and the final cost and schedule performance.
- In a review of 76 design-build projects in the US, QBS was found to have the lowest cost growth and the fastest construction speed when compared to sole source, best value, and low bid.

QBS Simplifies Complex Projects



KEY FACTS

QBS ensures complex projects have the best talent by engaging experienced, stable design teams.

- As the complexity of a project grows, the positive impact of using QBS grows along with it.
- Projects with community involvement, social components, and additional community features require design firms with broader knowledge and understanding, not just the best price.
- Less qualified and experienced firms might have a harder time balancing these complicated social factors, thus elevating the benefits of using QBS procurement to select more qualified, experienced, and ultimately successful design firms.
- QBS can encourage engineering firms to team in ways that provide the owner with the greatest set of qualifications to successfully complete the project.

QBS Delivers Innovation



KEY FACTS

QBS procurement for design services produces innovative solutions. When firms have greater opportunity to explore innovations, they can produce better outcomes for clients. QBS enables innovation because price is not the only driving factor.

- A recent study showed that when QBS was used, projects that mentioned complexity either in terms of physical challenges or in terms of social or political challenges were consistently higher in terms of innovations.
- The use of QBS illustrated how an experienced team brings enhanced innovation to a project that is intended to be a national showcase and a key economic driver for a city.
- Direct cost and schedule benefits, indirect benefits of reduced management issues, and increased innovation are why QBS demonstrates a clear benefit when applied across a series of project types and geographic regions.
- Innovation is an indirect measure of project complexity as more complex projects often require more innovative solutions to address those specific project challenges. Innovation is a measure of how design firms approach a project in terms of the flexibility of solutions they may bring to the project.

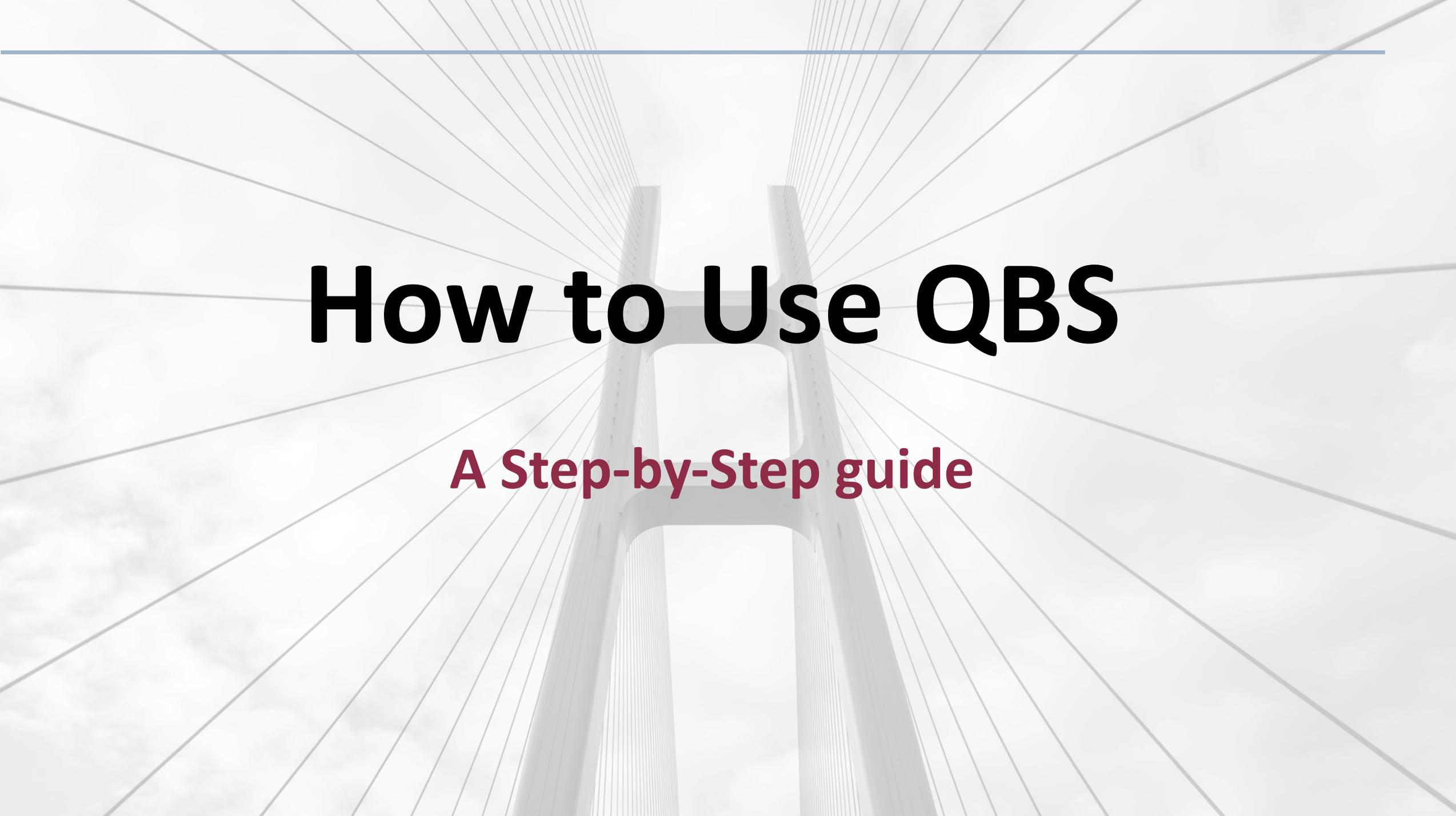
QBS Drives Procurement



KEY FACTS

QBS is the primary procurement tool – even for agencies that experience lean staffing and high turnover.

- Turnover in procurement departments has been increasing over the last decade with long-term civil servants retiring and procurement turning over to less experienced individuals in a number of areas. Concurrent with this turnover has been a significant increase in the level of advocacy from alternative procurement groups. In this combination, the level of knowledge concerning the core benefits of utilizing QBS has dropped amongst some local jurisdictions.
- There are many smaller jurisdictions where procurement responsibilities do not fall to a dedicated staff. Rather, procurement is part of a larger set of responsibilities that a single individual may have. In these cases, individuals have reported that they believe QBS may take longer up front and this presents a capacity issue.
- Across all state agencies, the majority of state directors are saying that all state agencies are using QBS at least 80% of the time.
- Counties, municipalities, school districts, and other agencies are found to be using QBS closer to the 41-60% range.



How to Use QBS

A Step-by-Step guide

The Basic Steps of QBS

- **Identify your project**
- **Issue a Request for Qualifications**
- **Evaluate the qualifications**
- **Make a short list of firms to be interviewed**
- **Conduct interviews**
- **Rank firms**
- **Select your top-ranked firm**
- **Jointly define scope of work with the top-ranked consultant**
- **Negotiate a fee**
- **Execute a contract**

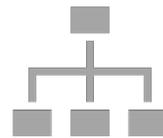


QBS for Public Sector Procurement

Why QBS over other procurement methods?



QBS procures design firms that can **balance** complicated social factors



QBS obtains design teams with **experience** in managing project roles and responsibilities



The QBS process provides a well-founded combination of **quality**, **service** and **value** to taxpayers

QBS Procures Design Firms that Can Balance Complicated Social Factors

- Projects with community involvement, social components, and additional community features require design firms with broader knowledge and understanding.
- Less qualified and experienced firms might have a harder time balancing these complicated social factors, showcasing the benefits of using QBS procurement to select more qualified, experienced, and ultimately successful design firms.

QBS Obtains Design Teams with Experience in Managing Projects Roles and Responsibilities

- Teams with greater experience working together, and in the same sector, consistently produce documents that result in fewer delays during the construction process caused by incomplete documents or documents requiring clarifications.
- Having a team with the right experience to understand individual roles and responsibilities during a complex project build sets a project up for success.

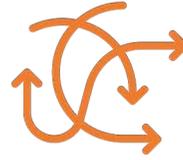
The QBS Process Provides a Well-Founded Combination of Quality, Service and Value to Taxpayers.

- While research strongly suggests that QBS provides major benefits to complex projects in particular, it is similarly important to note that QBS has been found to have the same merits in less complex projects as well.
- Choosing an experienced team over a cheaper, possibly much less competent team, provides a well-founded combination of quality, service and value to taxpayers.
- QBS produces the right outcomes for success on any type of project, not just innovative or complex projects.



QBS for Private Sector Procurement

Why QBS over other procurement methods?



QBS helps **assemble** the most qualified team for complex projects



QBS **facilitates** procurement of expertise needed for unique construction challenges



Projects with design challenges and quick deadlines are **achievable** when utilizing QBS

QBS Helps Assemble the Most Qualified Team for Complex Projects.

- By harnessing the different strengths of the individual offices, teams can focus on experience and qualifications, rather than offering the lowest cost.
- These qualifications allow the team to minimize interruptions during the project, overcome project complexities, and introduce innovative solutions in the final design.
- Complexity and qualifications can tie together to meet the needs of the client as well as the general public served by the project.

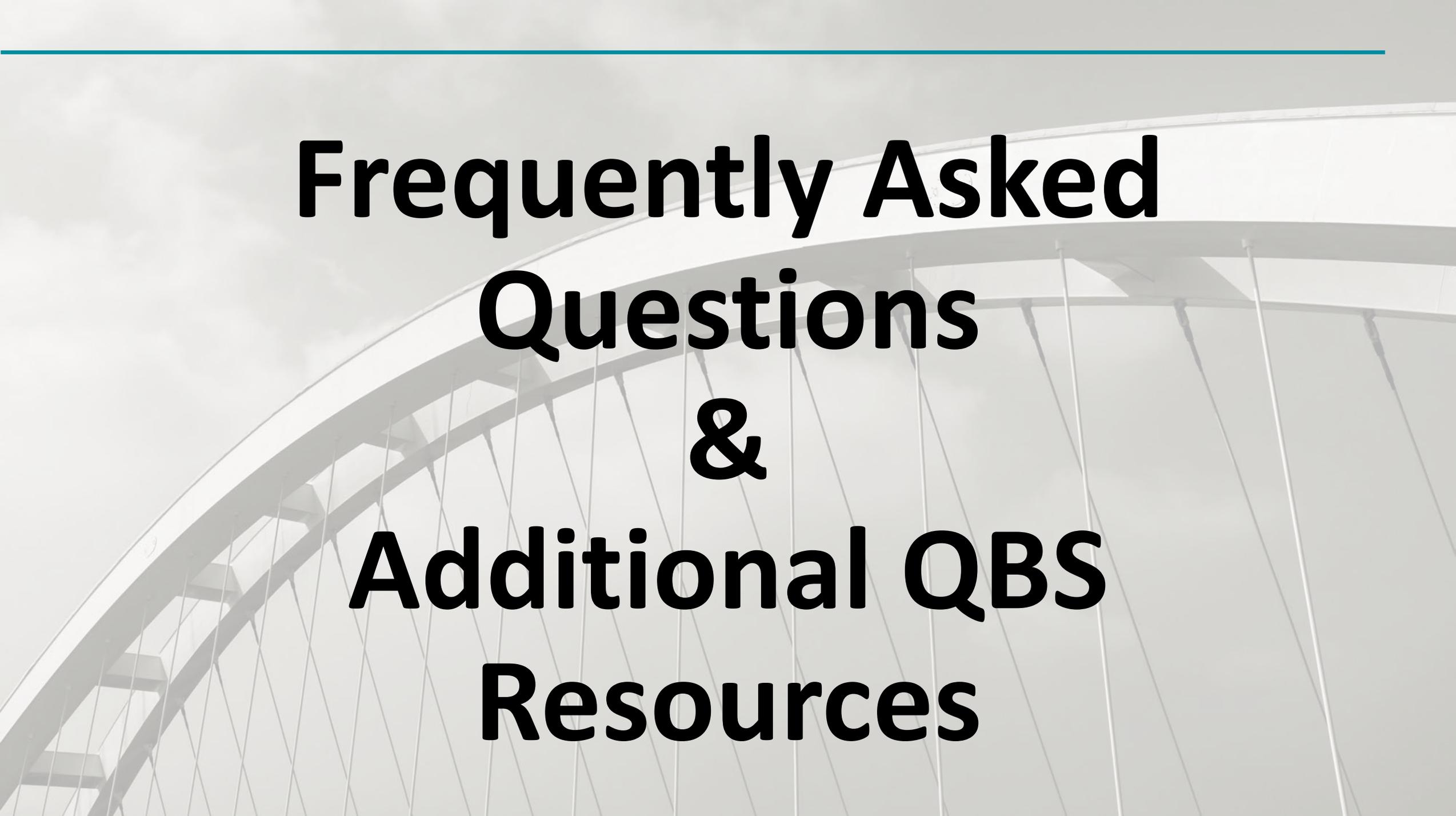
QBS Facilitates Procurement of Expertise Needed for Unique Construction Challenges.

- QBS is a key element when specific experience and the ability to manage complicated processes are required to bring a project to successful completion.
- The use of QBS illustrates how an experienced team can bring enhanced innovation to large-scale projects.

Projects with Design Challenges and Quick Deadlines are Achievable when Utilizing QBS

- When a project needs to solve a series of technical design challenges under a constrained time frame, potentially while working with a less experienced owner, QBS evaluates all the capabilities of a team to ensure the experience and expertise are in place to meet the demand.

Frequently Asked Questions & Additional QBS Resources

The background of the slide features a grayscale image of a cable-stayed bridge. The bridge's structure, including its curved deck and numerous support cables, is visible against a light, overcast sky. The text is centered over this image.

FAQ

Is QBS more expensive?

The perception that QBS procurement's focus on qualifications results in higher design fee costs has been shown by research to be incorrect.

Can't overinvesting in design lead to higher project costs?

Investing more in design effort has been shown to reduce the project's final cost from early estimates by solving construction problems during the design phase when the costs are lower than after construction has commenced.

Does QBS really eliminate cost increase?

QBS projects analyzed in a recent study showed an overall project cost growth of 3%. This is half of the national average of 6%.

FAQ

Can QBS prevent schedule delays?

In terms of schedule growth, QBS projects outperformed the national average by having a schedule growth of 7% versus the national metric of 10%. This is a 30% reduction in the typical schedule growth of a project.

What are the benefits of using QBS to procure engineering services?

Having a team with the experience to understand individual roles and responsibilities during a complex project build can help to ensure milestones are met.

How does QBS impact timing?

The latest study shows that about half (48%) of QBS projects met all construction milestones with no adjustment in schedule required. Conversely, only 32% of non-QBS projects had the same performance. This is a 50% increase in the number of projects that met all schedules.

Should QBS be reserved only for complex projects while simpler projects can use alternate procurement methods?

QBS has been found to have the same merits in less complex projects and provides a well-founded combination of quality, service, and value.

Since complexity is a subjective determination, won't teams who are unable to handle it be eliminated in review?

Complexity can emerge from numerous points in a project including: community engagement, political or social sensitivities, technical challenges in design or in constructions, or management and collaboration of project participants. In short, complexity of a project can emerge from multiple known or unknown project elements, each of which benefits from the experience identified through QBS procurement.

How do you quantify innovation in QBS versus non-QBS projects?

QBS projects were 23% more likely to have moderate or significant innovation included in the solutions while non-QBS projects were 79% more likely to have little or no innovation included in the project.

FAQ

How often is QBS utilized?

QBS continues to be mandated in some form in all but 2 states and is uniformly applied in the majority of state level projects, such as Federally funded transportation projects.

Can QBS inhibit competition?

QBS focuses competition for professional services on the most meaningful factors, including qualifications, competence, previous performance, and availability. QBS ensures competition is about more than just cost.

Are states using alternative procurement methods?

The commitment of state governments to QBS contracting continues to be strong. QBS contracting processes are embedded in state laws throughout the US. In ten states the law is further supplemented with the state agency regulations or an executive order. Only two state directors report a lack of any state mandate for QBS contracting processes.

What about local jurisdictions?

QBS continues to be the primary procurement tool at the state level and throughout statewide agencies. The majority of state directors are saying that all state agencies are using QBS at least 80% of the time. There is concern that the use of QBS drops off when the focus of procurement moves to the local levels. Counties, municipalities, school districts, and other agencies are found to be using QBS closer to the 41-60% range.

Additional QBS Resources

- program.acec.org/qbs-resources-portal
- [A Guide to Qualifications-Based Selection of Design Professionals](#)
- [APWA Red Book on Qualifications-Based Selection](#)



Thank you

