



Certified  
Development  
Strategist™

AIACC Program for Certified  
Development Strategists



Understanding the  
**Architecture**  
of **Business**



**AIA**  
California Council

A Certified Development Strategist understands the “architecture of business”. They understand not every project has a built solution. They guide the owner/client in the development of facility options – from funding to real estate to design, construction and occupancy.

the client's trusted advisor

*“The CDS brings a more global view of the development process and a complete understanding of possible solutions to any client problem.”*

***Gordon N. Park, AIA, CDS Program Chair***

# THE CERTIFIED PROFESSIONAL

## What special skills does a Certified Development Strategist<sup>SM</sup> have?

They have demonstrated proficiency in a number of professional skills and competencies including:

- Assisting clients on the development of the essential elements of real estate projects;
- Assisting in the creation of the strategic vision and the program development;
- Managing the process of site identification and acquisition, financial models, budgets and pro forma analyses;
- Managing communications and the assembly of a project team to provide the range of A&E and construction services that may be required;
- Have verified experience, education and background;
- They have demonstrated competence in the visioning and execution of development projects and have combined those skills with the architectural skill sets of coordinating many services, skills and trades to achieve project goals.

## Why become a Certified Development Strategist?

To remain relevant in an evolving marketplace the architectural profession must ask if it is still focused on the needs of clients.

*Do our services meet and exceed our clients' needs and expectations?*

This program is a proactive response to that question. As a Certified Development Strategist, you will have the tools to respond to the expanding needs of owners/clients. The diversity of skills will help ensure a business future responsive to market demand cycles.

With a complex and ever-changing marketplace, owners and clients are looking for a predictable outcome on increasingly complicated projects. Many owners/clients desire a single source of responsibility resulting in a predictable development process. This program identifies those individuals qualified to deliver on that market need and to help fulfill the owner's expectations of a predictable outcome.

## How does this Certification give me a marketing advantage?

The message to your clients is that there are many purveyors of strategic development advice, but that which comes from the licensed architect is informed by a synergistic understanding of: facilities operations; building systems; contextual and environmental issues; how teams work together; how buildings actually get built and how they perform and evolve.

## What is the value of the Program for Certified Development Strategists to the Client?

The AIACC Certified Development Strategist will help the owner achieve the optimal business solution. By advising owners on important issues from real estate evaluation, financing, and programming through design, the Certified Development Strategist brings a more global view of the development process and a complete understanding of possible solutions to any client problem.

## Why do we need a Program for Certified Development Strategists?

Like it or not, the role of the architect is seen as a limited player in the development process. The Program for Certified Development Strategists is a response to a changing marketplace. It is in essence "an expanded definition of architectural practice" responding directly to owner requested services. The program will allow qualified architects the opportunity to obtain certification in related professional skills and competencies and to offer clients comprehensive services beyond the traditional design services defined by the Architects Practice Act.

## Why is the Program for Certified Development Strategists important to the profession, to AIA members, and to me as an Architect?

- It allows qualified architects the opportunity to obtain certification in related professional skills and competencies; in fields of specialization they are already expert and practicing in.
- It allows members to obtain specialized skills and knowledge without leaving the AIA.
- It assists firms by enhancing the skills and services of their employees, thereby adding value and an expanded portfolio.
- It addresses the needs of architects in both the public and private sectors.
- It continues to build the AIA brand with the client while meeting the clients' professional service expectations.

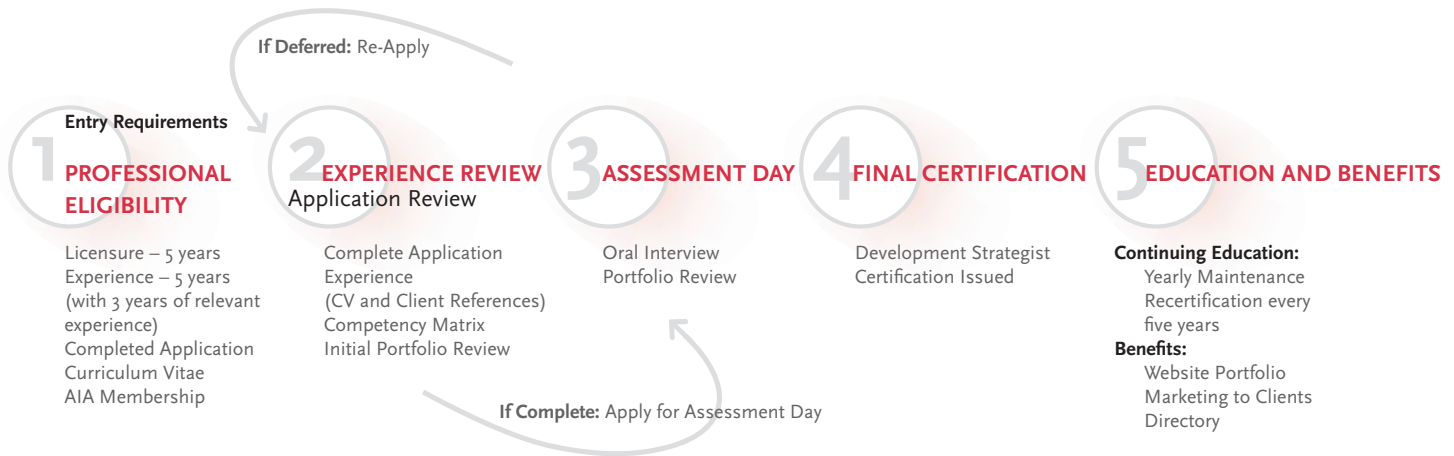
# Leadership

*"this certification sets the stage for our leadership as Architects to focus on the client's business needs rather than just the building"*

**Brad Henderson, AIA, CDS**

# THE CERTIFICATION PROGRAM

The Program is a five-step process.



Applications for the program are accepted throughout the year.

## STEP 1 – PROFESSIONAL ELIGIBILITY

Application for the Certification Program. You must submit three items to be considered for the program:

1. Your completed and signed application.
2. Application fee of \$275.
3. Your completed AIA Membership Application and membership dues (if not currently an active member).

*Your application cannot be processed until all three items listed above are received in the offices of the AIACC.*

## STEP 2 – EXPERIENCE REVIEW

AIACC staff and a panel of professional advisors will review your application materials. This process can take up to 30 days. Once completed, you will receive written notification of your status. If you meet the criteria to continue to the next phase, you will also receive a separate application to register for the Assessment. If you are determined to not yet be eligible for Assessment, a detailed summary will be forwarded to you outlining areas that need further attention.

## STEP 3 – ASSESSMENT DAY

The Assessment is the final examination of your knowledge, experience and skills, as defined in the Competency Matrix. This examination also provides you with the opportunity to demonstrate your ability in applying these competencies in a practical situation. Each Assessment will take approximately two hours to complete.

### The Assessment: Oral Interview

All application materials and any other items you wish the panel to consider in evaluating your work will be reviewed and you will have an opportunity to discuss your portfolio. You will be asked a series of questions addressing each of the four skill areas listed in the Competency Matrix (see back page). Each question will focus on a specific area and your ability to present a thoughtful and complete response will be evaluated by a panel. This short presentation also allows the panel to review your thought processes and presentation ability as well as your experience and education. You may provide samples of your work in support of your understanding of the issues as part of your presentation.

### Assessment Schedule

Please refer to [www.developmentstrategist.org](http://www.developmentstrategist.org) for a complete schedule.

### Application for Assessment

A separate application will be forwarded to you when you are notified you have completed the application review process. You must apply to participate in the Assessment Day process at least 30 days prior to the scheduled Assessment.

**legitimacy**

*"The certification will validate the specialty nature of the services and act as a pre-qualification of competence." William Kortsch, AIA, CDS*

# THE PROCESS AND BENEFITS

## Preparing for Assessment

There is no “best way” to prepare for the Assessment. Each person has different educational and professional backgrounds and will probably need to review different topic areas.

The Assessment examines your knowledge in: Client Services, A&E Services, Construction Services and the Core Skills that tie the team together. The Competency Matrix describes in detail the specific skills that are required.

The AIACC understands the program’s criteria demands excellence in many areas; reviewing these specifications will help you self-assess your level of proficiency. From there, you might want to select resources from the *Compendium of Resources* to help you review. Finally, as an AIA member, you may also want to review with your colleagues in your local AIA chapter who are participating in the Certification program as well, or with those who have already received certification. The *Compendium of Resources* can be found online at [www.developmentstrategist.org](http://www.developmentstrategist.org).

## STEP 4 – FINAL CERTIFICATION/BENEFITS

You will receive written notification of the results of the Assessment within 14 business days. If you successfully completed the Assessment, you will be entitled to all of the benefits of Certification including:

- Use of the title “Certified Development Strategist, CDS”
- Web site portfolio
- Marketing of the Development Strategist Certification to clients
- Inclusion in the on-line CDS directory

The intangible benefits of certification include:

- Provides credibility in a competitive marketplace
- Validates credentials

In addition, you will be eligible to purchase an official certificate, commemorating your achievement.

Length of Certification is five years.

## STEP 5 – CONTINUING EDUCATION

You can re-certify every five years simply by documenting your participation in professional continuing education or other professional development activities. After you become certified, you will receive complete details on the re-certification process, including yearly maintenance fees and activities.

## How much does it cost to become Certified?

In the Certification program, each of the fees is separate, thus allowing participants to select those areas in which they want to participate. There are five separate fees: Application, Assessment, Certificate, Maintenance and Re-Certification.

### 1 APPLICATION

To apply to the AIACC Certified Development Strategist Program, the fee is \$275. This fee is non-refundable.

### 2 ASSESSMENT

Once you have been approved to participate in the Assessment process, there is a separate fee for Assessment of \$375. This fee is not refundable, but can be transferred to an alternate Assessment Day, should you be unable to attend.

### 3 CERTIFICATE

Once you successfully complete the Assessment, there will be a \$100 certificate fee.

### 4 ANNUAL MAINTENANCE

Once you are certified, a yearly maintenance fee of \$60 will be due each year for maintenance of your website and marketing materials.

### 5 RE-CERTIFICATION

Finally, every five years you can re-certify by documenting your participation in professional continuing education or other professional development activities and paying a \$125 fee.

## What if I don’t pass the Application Review or Assessment?

The AIACC understands the program’s criteria demands excellence in many areas. If your experience falls short of the minimum requirements, every effort will be made to assist you in completing the requirements for Certification.

### APPLICATION

Your application and materials will be reviewed by a qualified professional. Upon review, if it is found your experience falls short of the minimum requirements, it will be immediately referred to a second reviewer. If it once again fails to pass, it will be returned to you with specific suggestions of how to remedy the deficiencies. If you then resubmit the application and again do not pass, you will be asked to wait a minimum of one year before reapplying.

### ASSESSMENT PANEL – ORAL INTERVIEW

Upon completion of the Oral Interview, you will be sent a letter explaining your status. If you fall short of the minimum requirements, you will be given specific instructions of how to remedy the deficiencies.

If you do not pass the first time, you will be asked to reapply. If you do not pass a second time, you will be asked to wait a minimum of one year before reapplying.

# THE CHANGING ROLES OF THE ARCHITECT

## How does the Program for Certified Development Strategists expand the Architect's role?

The certified professional is more likely to be engaged in strategic boardroom decisions and will likely continue through the entire development cycle. In a more traditional role, an architect would likely respond with a “physical solution”; a project whose program might be defined by others. The Certified Development Strategist's services are more likely to be engaged long before a project needs to be designed.

The Certified Development Strategist will have demonstrated a broad understanding and competency in over fifty specific skills, focusing on the client, the architect, the contractor and finally the core skills that bind each of these entities together.

In the traditional role, an architect would enter the process mid-stream, responding to a client's RFP. After design, the project would be handed to a contractor to build. For the owner/client, this might mean three contracts:

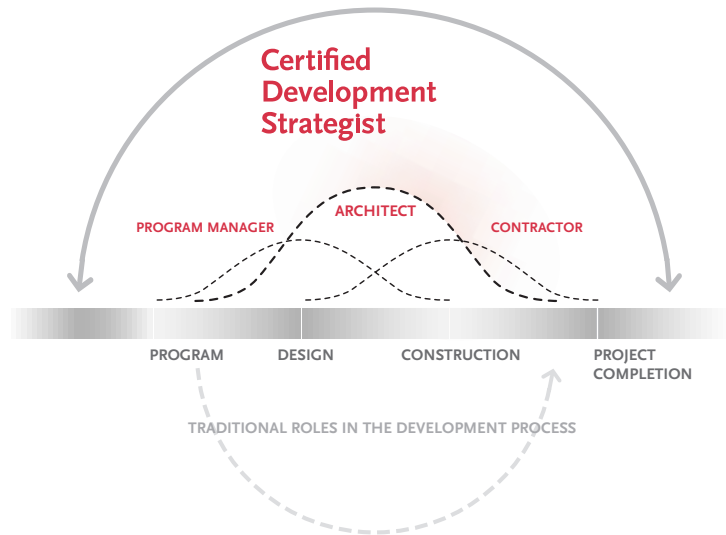
- First, to define a need
- Second, to design a solution
- Third, to construct

## What role does a Certified Development Strategist Play in the Development Process?

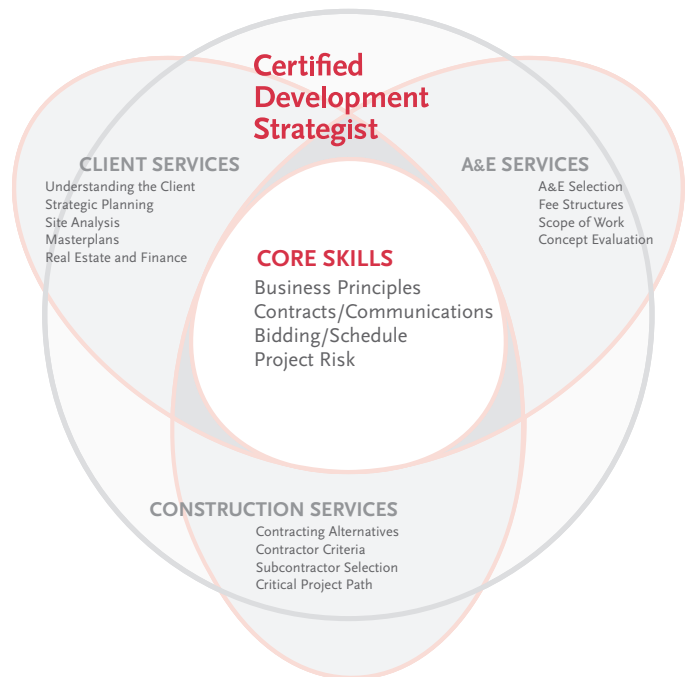
The Certified Development Strategist has a comprehensive understanding of the entire development process, with the unique ability to see the universe of players each from his/her own unique vantage point. This ability to gain the perspective of others is the key to the success of the relationship between the three main players: the owner, the architect and the contractor.

The Certified Development Strategist's role is to bring the parties together as a synergistic whole creating the best solution for the client. As the diagram depicts, there are three legal entities in this simple model when a project is being evaluated (the principles of the process would apply to almost all delivery methodologies). The Certified Development Strategist, beyond comprehending each player's contribution, also has the necessary core skills that bind the group successfully together. Core Skills include: communications, media relations, contracts and risk management, etc.

Being certified will require different levels of skill and ability in various areas. It is anticipated that the Certified Development Strategist will have a working knowledge sufficient to advise the client and when required, would hire a consultant to complete a more detailed analysis.



As a Certified Development Strategist the role is now of a *trusted client advisor*, involved for the entire business cycle.





## FREQUENTLY ASKED QUESTIONS

### I am already doing this type of work – how will this Certification benefit me?

Many architects are currently competing with other professionals to provide these types of services. Financial consulting firms, project management firms, and specialized consultants may also have some expertise, but they do not have the training and experience that architects possess and they do not have any particular credentials as “development strategists.” You, on the other hand, may possess both the training and the experience to provide a broader than usual range of services to your clients. By validating and certifying those extra skills, above and beyond those you have already achieved in becoming a licensed architect, the AIACC hopes to provide you with the credentials that will constitute a competitive advantage over unlicensed and uncertified consultants.

### How does Certification benefit my firm?

The Program for Certified Development Strategists allows your firm to better meet your clients’ needs and expectations. It validates the increased levels of expertise and enables your firm to provide expanded services.

As the client’s “trusted advisor,” the Certified Development Strategist will enable architectural firms with various sizes and portfolios of practice to offer these services. Some firms may have multiple staff disciplined in many areas, offering a full menu of services to the client. Other firms may choose to form strategic alliances with other firms to maximize their portfolio. Finally, others may specialize in smaller areas but have access to many other experts. In all cases, each certified individual will have a broad and comprehensive ability, understanding or awareness of the skills needed for certification.

### How long does the Certification process take?

The process to obtain certification is contingent upon two steps: submitting your application and its subsequent review for qualification to attend the Assessment Day. Although applications are accepted throughout the year, evaluation of these documents takes place quarterly. Assessment Day is also held quarterly, approximately 30 days after the evaluations.

Typically, candidates spend 10-12 hours in preparing their application, with the majority of their time spent organizing their portfolio and collating examples of their past work to support their level of competency in a particular area. In addition, several hours are spent obtaining letters of reference from clients and past employers. However, if a candidate recognizes a deficiency in a particular skill required for Certification, he/she might spend a number of hours researching, learning and/or attending a course to augment his/her experience.

### Why is the application so long?

The application for the Program for Certified Development Strategists was designed to allow a candidate to self-assess their professional skills and competencies. It then enables the candidate to provide a narrative as to how these skills relate to actual experiences. Finally, recognizing the breadth of proficiency required for certification, it allows the evaluation panel the opportunity to assess the candidate’s skills and prepare for the oral examination.

### What kind of courses do I need to take to be Certified?

This certification program is a competency based program. It validates professional skills and abilities the candidate currently holds as a result of his/her experiences. Any courses you take would be to augment those professional skills and are not, in and of themselves, a requirement for Certification.

#### LARGE FULL SERVICE FIRM

All resources are provided in-house.



#### MEDIUM SIZE FIRM

Partners with a few key consultants.



#### SMALL FIRM

Partners with several specialized consultants.



# CERTIFICATION PROGRAM – SKILL SETS AND ABILITIES

## Skill Sets and Abilities

For more detail regarding each of these skills, please refer to the Competency Matrix located on page 9 of the Application.

<i>CLIENT ADVISOR (CA)</i>		<i>A &amp; E SERVICES (AE)</i>	
	<b>UNDERSTANDING THE CLIENT</b>		<b>A &amp; E SELECTION</b>
CA1	Needs, Current and Future	AE1	Selection of Appropriate Services
CA2	Goals/Specific Objectives	AE2	Criteria
CA3	Culture/Values/Social/Employment Issues	AE3	Procedures
CA4	Significant Constituencies	AE4	Special Consultants
CA5	Decision Making Process	AE5	Scope of Services
CA6	Minority/Women Business Enterprises		
	<b>STRATEGIC PLANNING</b>	AE6	<b>FEE STRUCTURES</b> Fee Options
CA7	Underlying Premises and Assumptions		
CA8	Public Sector Financing Principles		<b>CONCEPT EVALUATION</b>
CA9	Private Sector Financing Principles	AE7	Conformity with Client Needs/Program
CA10	Strategic Facility Options	AE8	Design Evaluation
CA11	Conceptual Budgets	AE9	Public Policy
	<b>PROGRAMMING</b>		<b>CONSTRUCTION SERVICES (CN)</b>
CA12	Translation of Organizational Needs into Facility Programs	CN1	Contracting Issues
CA13	Integration with/and Development of Masterplans	CN2	Contracting Alternatives
CA14	Adaptability to Future Growth and Change	CN3	Contractor Selection Criteria
	<b>SITE IDENTIFICATION/ACQUISITION</b>	CN4	Labor Issues
CA15	Site Evaluation Factors and Procedures	CN5	Construction Schedule
CA16	Impact on Design Options	CN6	Contractor Performance
CA17	Environmental Concerns & Impacts		
	<b>REAL ESTATE/DEVELOPMENT/FINANCING</b>		<b>CORE SKILLS (CS)</b>
CA18	Real Estate Development Principles		<b>COMMUNICATIONS (DAY-TO-DAY)</b>
CA19	Development Process/Participants	CS1	Communication Tools
CA20	Sources of Public and Private Financing	CS2	Record Keeping
CA21	Mortgage Risk Analysis	CS3	Media/External Relations
CA22	Policies and Practices of Major Lending Institutions		<b>BUSINESS PRINCIPLES</b>
CA23	Influences on Building Design	CS4	Principles of Contracts for Public and Private Entities
CA24	Project Cost Options/Tradeoffs	CS5	Risk Management
	<b>ENTITLEMENTS/COMMUNITY &amp; GOVERNMENT</b>	CS6	Ethics
	<b>RELATIONS/IMPACT ON SCHEDULES</b>	CS7	Schedule/Workflow
CA25	Entitlement Process	CS8	Insurance/Liability
CA26	Public Relations/Communication and Presentation Methods	CS9	Project Development/Program/Design Process
CA27	Consensus Building/"Informed Consent"	CS10	Public Policy
		CS11	Project Delivery Services

### AIACC Certified Development Strategist Program

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