|  |  |
| --- | --- |
| **COS-BW-Hori-Tagline.jpg** | ATTACHMENT 2 – FORM OF SUBMISSION |

**Notes:**

**1. *Additional rows/lines or additional pages may be added as necessary.***

**2. *While there is not limit on the number of pages to be submitted, to facilitate the evaluation process provide only relevant information.***

**3. *The inclusion of corporate brochures and other advertising materials is discouraged.***

This document is intended to provide information on the capacity, skill and relevant experience of the Respondent. Respondent may supplement information requested with additional sheets, if required. Please review this Attachment 2 thoroughly.

**PROJECT TITLE: PRE-QUALIFICATION OF DESIGN-BUILDERS – NEW NEWTON COMMUNITY RECREATION CENTRE**

**Reference No.: 1220-050-2024-006**

**Submitted To:**

City Representative: Sunny Kaila, Manager, Procurement Services

Email: [purchasing@surrey.ca](mailto:purchasing@surrey.ca)

|  |  |
| --- | --- |
| SECTION A. | GENERAL INFORMATION |



Full Legal Name of Firm



Business Address

1. Business Telephone:
2. Website address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Contact Person for inquiries (full name, position, telephone and email address): \_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |
| --- | --- |
| SECTION B. | RESPONDENT’S COMPANY PROFILE |

1. Year Established: \_\_\_\_\_\_\_\_\_\_\_\_
2. Form of Business Organization:

|  |  |  |
| --- | --- | --- |
|  | Sole Proprietorship |  |
|  | Partnership – jurisdiction and date of establishment: |  |
|  | Corporation – jurisdiction and date of incorporation and incorporation number |  |
|  | Joint Venture – identify all joint venturers, and who has primary responsibility for this RFEOI/SOQ: |  |

1. **Respondent Summary** (Note: Provide background information (brief history, size, services offered, etc.))

|  |
| --- |
| Comments: |

|  |  |
| --- | --- |
| SECTION C. | RESPONDENT’S EXPERIENCE, REPUTATION AND RESOURCES |

**Experience and Qualifications:**

1. Respondent’s relevant experience, qualifications and applicable certifications to perform the Services including any experience and expertise with:

* progressive design-build;
* design optimization, including value engineering and designing to cost targets;
* integrated project delivery methods (i.e., IPD, CMAR, etc.);
* projects of a similar scope and budget (previous experience with major public civic facility construction projects related to new build including, recreation and cultural centres, aquatic and sports facilities, libraries, etc., that involve municipal permitting and land development requirements);
* projects of similar complexity;
* delivery of projects through a multi-phased approach and within tight project timeliness;
* collaboration and working closely with owners, consultants’ teams and stakeholders to improve project delivery to bring best value for the City (e.g., achieve cost savings, maximize space utilization, etc.);
* proven ability to understand facility operations needs, identify space requirements and limitations and configure and design improvements to reflect Project objectives and maximize utilization;
* organizing work scope in and around occupied areas;
* Building Information Modeling (BIM); and
* constructing high efficiency energy performance buildings (LEED, Passive House, Net Zero Carbon, etc.).

|  |
| --- |
| Comments: |

1. **Team Organization**

(a) Selecting a design team involves several critical steps to ensure that the team has the right mix of skills, experience and creativity to meet the project’s goals and objectives. Respondent to describe strategy and approach for the design-build team formation:

|  |
| --- |
| Comments: |

(b) Provide a list and short profile of key personnel and firms who would be involved in the Project. By completing this information, you warrant and represent you have each individual’s consent to disclosure of their personal information to the City in accordance with privacy laws.

Example

| **Name and Title** | **Area of Responsibility** |
| --- | --- |
|  | Overall Project management |
|  | Strategies & Processes |
|  | Design Management |
|  | Value Engineering |
|  | Quality Control & Quality Assurance |
|  | Costing and Budget Control |
|  | Overall construction management. |
|  | Design assist and engagement of key trades |

(c) Provide A full profile of the Respondent’s proposed Project team that includes:

* Resumes of assigned key individuals involved in the preconstruction and construction phases of the Project including, other major participants as they may apply,
* Experience relevant to their proposed role on the Project and how their past performance on previous projects will benefit this Project.

(d) Respondent should describe its design-build team members past performance in developing integrated design and construction schedules for projects of similar scope and complexity.

|  |
| --- |
| Comments: |

(e) Respondent should describe the design-build team’s past performance in developing and/or managing costs within a GMP.

|  |
| --- |
| Comments: |

(f) Respondent should describe the design-build team’s past performance working together and/or describe the steps the proposed design-build team has taken in the past to promote integration and collaborative working environment. Include a brief for previously accomplished projects through partnership(s) of the design-build’ team.

|  |
| --- |
| Comments: |

(g) Respondent should describe how the proposed design-build team will meet the Project’s

objectives and goals and create a great facility.

|  |
| --- |
| Comments: |

**Representative Projects:**

11. Describe the Respondent’s past performance in successfully managing a progressive design build (or similar integrated project delivery method) projects of similar size and budget that includes design and construction:

(a) List of three most relevant completed projects by you as the lead firm for the past five (5) years. Listed in Appendix “A”. [As attached].

(b) Identify similar or related projects underway as of date of Submission. Listed in Appendix “B”. [As attached].

|  |  |
| --- | --- |
| SECTION D. | RESPONDENT’S TECHNICAL SUBMISSION |

**Overall Management Approach**

12.Respondent should describe your overall management approach and methodology that the Respondent would take in performing to a progressive design-build process. In responding to this request Respondents should address, but not limited to the following:

(a) What strategies would your design-build team employ to achieve a thorough and clear understanding of the City’s goals and objectives?

|  |
| --- |
| Comments: |

(b) Provide a narrative that illustrates and understanding of the City’s objectives, requirements and Services?

|  |
| --- |
| Comments: |

(c) Provide a narrative in the spaces provided below that illustrates the proposed design team’s ability to undertake the following project qualifications in a design and construction model:

| **Description** | **Narrative** |
| --- | --- |
| Stakeholder Management |  |
| Environmental Responsibility & Sustainability |  |
| Value Engineering |  |
| Procurement Strategy |  |
| Creativity and Innovation |  |
| Technology |  |
| Design-Assist Philosophy and Engagement of key trades |  |
| Scope & Schedule Management |  |
| Risk Management Strategy |  |

13. Identify three (3) key challenges to the Project, and for each challenge identified:

* propose a strategy to mitigate the potential negative impacts of the challenge; and
* identify any unique approaches, strengths, and differentiating resources that would assist a design-build team to implement the strategy and assist the City in achieving its goals.

|  |
| --- |
| Comments: |

**GMP Development**

14. Describe your processes and tools for monitoring, reporting and managing cost, including but not limited to:

(a) design to budget control and reporting processes;

|  |
| --- |
| Comments: |

(b) scope, cost, and schedule baseline development and management/change control processes and the participation and interaction among the scheduling and estimating teams, project, design, construction, and operations management teams to exercise these processes.

|  |
| --- |
| Comments: |

**Collaboration and Integration**

15. One of the primary goals for a progressive design-build project is to create a highly functioning, collaborative, and integrated team as early as possible and to incorporate the City’s staff, and other key stakeholders as part of that team.

.1 Please explain your approach to creating a collaborative environment for a project;

.2 Please describe how your design-build team would engage the project stakeholders and incorporte their input into a progressive design build project; and

.3 Please provide your approach to conflict resolution between the City and the Design-Builder and among members a design build team.

|  |
| --- |
| Comments: |

**Design Development and Management (Approach):**

16. Respondent should describe their overall approach to design excellence, design commitment, design development, and management for the Project. Respondent should include a brief narrative of the design management process, QA/QC and the communications between the City, multiple internal and external key stakeholders during this process.

|  |
| --- |
| Comments: |

17. Respondent should identify the challenges in developing the design for this Project and how the Respondent will address those challenges.

|  |
| --- |
| Comments: |

18. Respondent should provide details regarding the tools used in the design process, including (BIM), clash detection and how those tools could assist the Respondent in achieving those goals.

|  |
| --- |
| Comments: |

19. Respondent should describe their approach to value engineering.

|  |
| --- |
| Comments: |

20. Respondent should describe their process for managing quality assurance and quality control during the design process.

|  |
| --- |
| Comments: |

**Project Sequencing and Scheduling:**

21. The construction schedule should meet the City’s estimated completion date, promote efficiency, and have the least amount of impact to the City’s operations and the Project stakeholders as possible:

(a) Describe the Respondent’s overall approach to scheduling and construction sequencing for the Project. Additionally, should include a description as to how the Respondent will address regulatory and stakeholder approvals.

|  |
| --- |
| Comments: |

(b) Identify the challenges in scheduling the construction for the Project and how the Respondent would address these challenges.

|  |
| --- |
| Comments: |

(c) Provide details regarding the tools used in developing optimal sequencing and coordination of the Design Services and Work and how those tools would assist the Respondent in achieving those goals. Factors to consider here are:

(i) Building Information Modelling (BIM); and

(ii) Administration of the consultants, subconsultants and trade contractors.

|  |
| --- |
| Comments: |

**Quality Assurance/Quality Control (“QA/QC”):**

22. Respondent should provide the following information regarding the Respondent’s approach on QA/QC. Should include the following information:

* The overall approach to both design and construction QA/QC;

|  |
| --- |
| Comments: |

* The Respondent’s processes and tools to facilitate QA/QC; and

|  |
| --- |
| Comments: |

* The Respondent’s reporting and functional between the quality management personnel and any proposed design-build team as a whole.

|  |
| --- |
| Comments: |

|  |  |
| --- | --- |
| SECTION E. | ADDITIONAL INFORMATION |

23. **Client/Customer References**: (*Note: List at minimum 3 current/recent (within past 5 years) client references for projects where you were the lead firm (excluding City of Surrey)).* We hereby consent to the City contacting references for the purpose of evaluating our Submission.

| **Company and Contact Name** | **Phone / Email** | **Work Description** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

24. **Financial References**:

We hereby consent to the City contacting references for the purposes of evaluating our Submission.

|  |  |  |
| --- | --- | --- |
| **Name and Address** | **Contact Name and Title** | **Contact Telephone and Email address** |
|  |  |  |
|  |  |  |
|  |  |  |

**Security Clearances/Background Checks**:

25. Describe your process for performing/updating background checks/security clearances for personnel and sub-contractors):

|  |
| --- |
| Comments: |

26. **Conflict of Interest:** – *check as applicable*

|  |
| --- |
| To the best of our knowledge, upon undertaking appropriate investigation and due diligence, we are not aware of any employees or persons who may be involved in this project, being “Associates”[[1]](#footnote-1) of the City, City of Surrey, employees or officers. |
| We are aware of conflict(s) of interest or potential conflict(s) of interest, as follows:*(Note: Identify parties and their role in the project, confirm their relationship based on the definition of “Associate”, and described the proposed solution to manage, minimize or eliminate any perceived or actual conflict(s).* |

27. **Other Information:** Respondent’s insights, comments and recommendations:

|  |
| --- |
| Comments: |

This Submission is submitted this \_\_\_\_\_\_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 2024.

**I/We have the authority to bind the Respondent.**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Name of Respondent ) (Name of Respondent)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Signature of Authorized Signatory) (Signature of Authorized Signatory)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Print Name and Position of Authorized Signatory) (Print Name and Position of Authorized Signatory)

**APPENDIX A**

**LIST OF THREE (3) MOST RELEVANT PROJECTS COMPLETED BY THE LEAD FIRM OR TEAM IN THE PAST FIVE (5) YEARS (SAMPLE)**

**Organized by year, in Canadian dollars (if space is insufficient, additional lines or pages may be added, if necessary)**

**Ref. #1. Project Title and Location:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Delivery Method: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Description/Scope: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Original Contract Value: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Final Contract Value: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Original Planned Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Actual Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name of Contract Owner**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Name, Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bus. Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name of the Consultant:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bus. Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Ref. #2. Project Title and Location:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Delivery Method: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Description/Scope: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Original Contract Value: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Final Contract Value: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Original Planned Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Actual Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name of Contract Owner**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Name, Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bus. Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name of the Consultant:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bus. Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Ref. #3. Project Title and Location:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Delivery Method: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Description/Scope: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Original Contract Value: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Final Contract Value: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Original Planned Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Actual Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name of Contract Owner**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Name, Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bus. Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name of the Consultant:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bus. Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**APPENDIX B**

**SIMILAR OR RELATED PROJECTS CURRENTLY UNDERWAY BY THE LEAD FIRM AS OF DATE OF SUBMISSION (SAMPLE)**

**(If space is insufficient, additional lines or pages may be added, if necessary)**

**Ref. #1**. Project Title and Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Delivery Method: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Description/Scope: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Original Contract Value: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Final Contract Value: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Planned Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Estimated Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Contract Owner: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Name, Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bus. Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of the Consultant: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bus. Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Ref. #2**. Project Title and Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Delivery Method: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Description/Scope: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Original Contract Value: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Final Contract Value: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Planned Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Estimated Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Contract Owner: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Name, Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bus. Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of the Consultant: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bus. Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Ref. #3**. Project Title and Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Delivery Method: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Description/Scope: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Original Contract Value: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Final Contract Value: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Planned Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Estimated Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Contract Owner: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Name, Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bus. Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of the Consultant: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bus. Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. "Associate" means (a) a spouse, (b) a parent, sibling, son or daughter, or the spouse of any one of them, (c) a relative who lives in the person’s home, (d) a company in which a person owns shares carrying more than 10% of the voting rights attached to all shares of the corporation, (e) a person’s business partner, or (f) a trust or estate of which a person is one of the main beneficiaries or for which the person serves as a trustee. [↑](#footnote-ref-1)