|  |  |
| --- | --- |
| **COS-BW-Hori-Tagline.jpg** | ATTACHMENT 3 – 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 1 thoroughly.

**Project Title: Pre-Qualification of Design-Builders – Chuck Bailey Recreation Centre - Expansion**

**Reference No.: 1220-050-2024-003**

**Submitted To:**

City Representative: Sunny Kaila, Manager, Procurement Services

Email: purchasing@surrey.ca

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

1.

Full Legal Name of Firm

1.

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. | PERFORMANCE METHODOLOGY |

**Project Understanding:**

1. Demonstrate your capability to perform the Services, your understanding of the Services through a discussion of the key issues, and your ability to meet the requirements of the Project.

|  |
| --- |
| Comments: |

**Approach:**

1. Provide a general overview of your approach to the Services, including as it relates to technical design and the distinct Project phases.

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| --- |
| Comments: |

**Methodology:**

1. Describe your plan and methodology to successfully accomplish the Project through the implementation of progressive design-build methodology.

|  |
| --- |
| Comments: |

**Assumptions and Risks:**

1. Include assumptions made and assessment of preliminary risks and proposed mitigation strategies.

|  |
| --- |
| Comments: |

**Performance Management:**

1. Describe how you would maintain quality control and meet quality standards in the performance of the Services.

|  |
| --- |
| Comments: |

|  |  |
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| SECTION D. | EXPERIENCE, REPUTATION AND RESOURCES |

**Experience and Qualifications:**

1. Describe your 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 and renovation to existing buildings including, recreation and cultural centres, sports facilities, or parks and outdoor plazas, etc., that involve municipal permitting and land development requirements);
* projects of similar complexity (i.e., shoring, underpinning, working within major transportation infrastructure such as TransLink’s SkyTrain, etc.)
* 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.).

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| Comments: |

**Representative Projects:**

1. 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]
2. Identify similar or related projects underway as of date of Submission. Listed in Appendix “B”. [As attached]

**Responsiveness:**

1. Describe your ability to complete assignments on time and within budget.

|  |
| --- |
| Comments: |

1. Confirm ability and approach to undertake the work within the estimated timelines provided, if any, or as may be otherwise required to maintain an aggressive schedule; and

|  |
| --- |
| Comments: |

**Reputation:**

1. **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** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

1. **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** |
|  |  |  |
|  |  |  |
|  |  |  |

**Resources:**

1. **Key Personnel**: *[Note: Provide a list and short profile of key personnel who would be involved in the Project. Include a brief description of their role, qualifications and related experience. 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.]*

| **Name and Title** | **Area of Responsibility** | **Experience Design and Construction** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

**Project Team Profile:**

1. A full profile of the Respondent’s proposed Project team that includes:
* Profiles of all firms or individuals participating;
* Resumes of assigned key individuals involved in the preconstruction and construction phases of the Project including, other major participants as they may apply,

*Note: If any are individuals, 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.)*

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

1. **Security Clearances/Background Checks**: *(Note: Describe your process for performing/updating background checks/security clearances for personnel and sub-contractors):*

|  |
| --- |
| Comments: |

1. **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).* |
|  |

1. **Performance Management**. Has your firm defaulted on a contract or had work terminated for non-performance within the last seven (7) years? [ ]  Yes [ ]  No. If “Yes”, briefly describe the project, date and circumstances:

|  |
| --- |
| Comments: |

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

|  |
| --- |
| Comments: |

This Submission is submitted this \_\_\_\_\_\_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 2023.

**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/Fax Numbers: Bus. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bus. Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Bus. Telephone/Fax Numbers: Bus. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bus. Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**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/Fax Numbers: Bus. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bus. Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Bus. Telephone/Fax Numbers: Bus. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bus. Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**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/Fax Numbers: Bus. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bus. Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Bus. Telephone/Fax Numbers: Bus. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bus. Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**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/Fax Numbers: Bus. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bus. Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Bus. Telephone/Fax Numbers: Bus. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bus. Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**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/Fax Numbers: Bus. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bus. Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Bus. Telephone/Fax Numbers: Bus. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bus. Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**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/Fax Numbers: Bus. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bus. Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Bus. Telephone/Fax Numbers: Bus. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bus. Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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)