



Request for Proposals for Construction Management Services

Issued	January 11, 2022
Inquiries and questions	llattoni@countryhospice.org
Last day for inquiries and questions	January 18, 2023 at 12:00 MST
Last day for responses issued to proponents	January 24, 2023 at 14:00 MST
Closing Date and Time:	January 31, 2023, at 4:30 pm
Conduct interviews if required	February 6 & 7, 2023
Notice of Award	Mid- February 2023



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1. Invitation

Foothills Country Hospice Society (FCHS) is seeking a Construction Manager using a CCDC 5B contract with specialized experience in the construction and renovation of complex residential care facilities such as hospice, long term care, or health care facilities. The project requires compliance with Alberta Health Services build requirements including, but not limited to, a minimum B3 building classification requirements of the NBC-AE, and Infection Prevention and Control requirements. The successful Proponent will be expected to enter into a CCDC 5b Contract, which may include supplemental conditions with the Owner. We are seeking pre-construction and construction services as outlined in Appendix A.

2. Project Overview

2.1. *Foothills Country Hospice Society*

At Foothills Country Hospice, we believe in providing the utmost care and compassion for those we serve, including support for loved ones. As an integral part of the community, our services span palliative navigation, end of life and bereavement support, and a growing range of community programming and residential hospice end of life care. A palliative approach to care focuses on the person and family, and their quality of life when dealing with life limiting or life-threatening illness.

Our existing eight bed, rural hospice home is located 1.5 km north of Okotoks on an 8-acre parcel of land, neighboring golden canola fields and nestled among forested landscapes with mountain views. Since opening our doors in January 2008, we have provided around-the-clock, compassionate care to more than 1,400 residents and their loved ones, an estimated 6,500 clients in total. We primarily serve a rural population of 76,500 including Okotoks-Priddis, High River, and Black Diamond, as well as supporting approximately 665,000 South Calgary residents.

Ninety percent of Canadians will die from chronic disease. Palliative care supports living well until the end of life, living pain free, supported by friends, neighbors, families, and healthcare professionals. Palliative care also encompasses the health and well-being of caregivers including grief and bereavement support. With Alberta's aging population, health systems and caregivers are under a great deal of pressure to deliver palliative care. FCHS serves a very diverse population and demand for our hospice care and services far outstrips what we can currently provide. Our vision is for **FCHS to expand its residential care to 16 beds** serving more than 200 residents each year and to grow beyond the residence to serve as a hospice without walls: to act as a catalyst for Okotoks and surrounding areas to become a compassionate





community, widen the circle of caring, and provide much-needed support to residents and caregivers facing serious illness and death.

The physical expansion entails a 12,600 sq ft expansion, and 2,700 sq ft renovation within our existing 13,500 sf hospice facility including related site improvements. Alberta Health Services has committed to operational funding, in part, for a 16-bed facility. The FCHS board has committed to fundraising for the capital build, and to address any shortfall in operational funding required on an ongoing basis. **Our goal is to break ground in the summer of 2023, and to be fully operational in early fall 2024. Our existing hospice operations will continue during construction and require minimal disruption.**

2.2. Design Development to Date

In late summer of 2021, Gibbs Gage Architects, now GGA-Architecture (GGA), and Williams Engineering Canada (WEC) were awarded the commission to provide architectural and engineering services for the design of the proposed expansion and renovations to the Foothills Country Hospice Society (FCHS). A Client Consultant Agreement was entered into in August 2021 and the consulting services commenced in September.

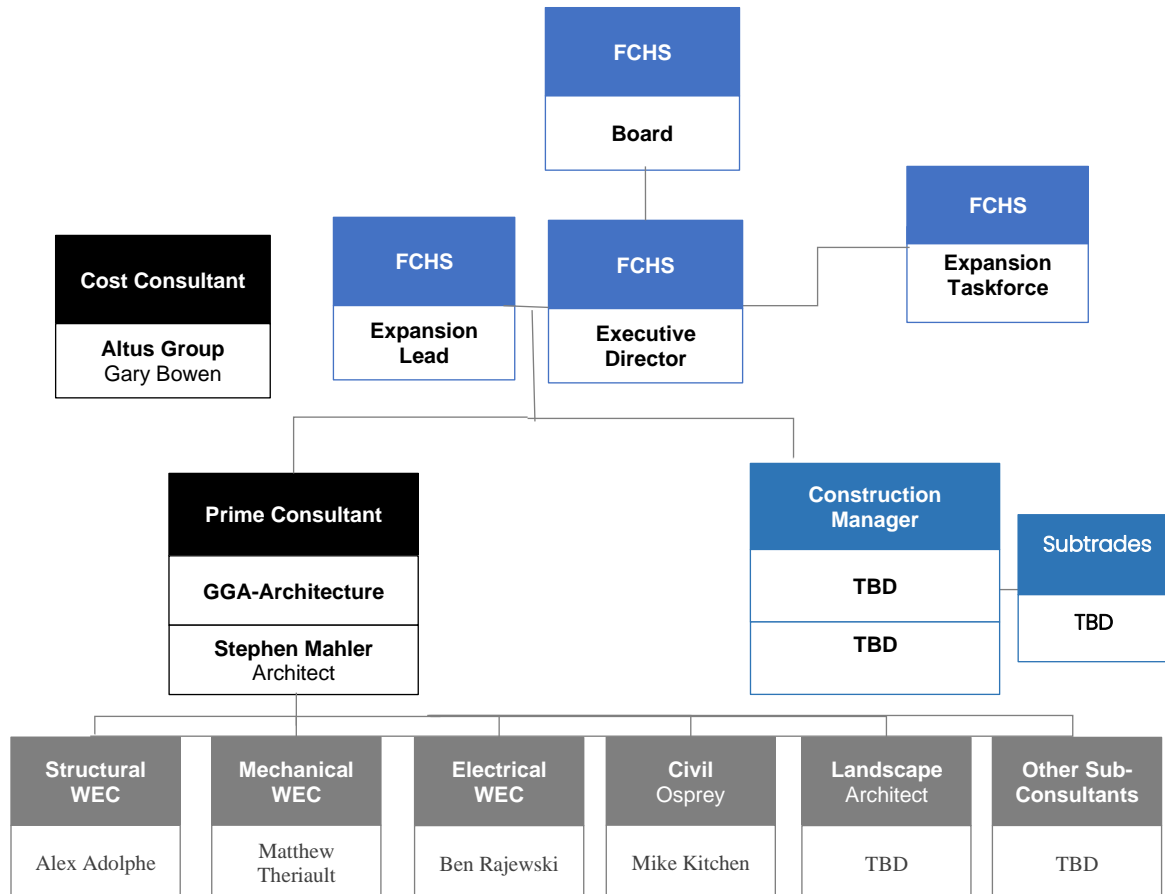
Consultant Team

- Architecture and Interior Design – GGA-Architecture
- Structural Engineering – Williams Engineering Canada
- Mechanical Engineering – Williams Engineering Canada
- Electrical Engineering – Williams Engineering Canada
- Energy Modeling – Williams Engineering Canada
- Civil Engineering – Osprey Engineering Inc. Black Diamond AB
- Cost Consulting – Altus Group
- Surveyor – Absolute Surveys, Okotoks





Project Organizational Chart



Summary of the Design Process

A Schematic Design (SD) report was prepared and approved by the FCCHS board in March 2022 which included a description of project scope, a summary of the concept design, as well as documentation of findings from several hospice case studies. A Cost Estimate was prepared by Altus Group based on the information in the SD report and accepted by the FCCHS board, as the basis to proceed with the Design Development Phase. Discussions for the advancement of the project recommenced in August of 2022, with more formal efforts of the consultant team commencing in September.





Design Development Report

A Design Development Report was prepared to document the design advancement including an updated cost estimate prepared by Altus Group which was used as the basis for FCHS to authorize commencement of the Contract Documents phase.

Estimate of Probable Project Cost and Approach to Cost Management

The build cost estimate has increased to \$6.736M (Dec 2022, Class C, Detailed Design estimate) from \$5.605M (December 2021 Class D, Schematic Design estimate). A value engineering approach utilizing preconstruction services from the selected Construction Manager will be utilized in the preparation of the contract documents with an objective to realize optimal value. Initial considerations have identified potential savings that could reduce capital costs to approximately \$6.273M. Additional savings may also be possible through the leveraging of support from suppliers and sub-trades who are 'friends of the hospice' investigating such opportunities is part of the rationale for using a Construction Management approach. The final approved budget will also depend on design decisions going forward.

Cost containment is a critical factor to support the ongoing health of the FHCS, which operates as a non-profit organization.

Project Schedule: Completed & Future Milestones

The following outlines some of the major milestones to date and those anticipated in the future:

Completed Milestones

- Sept 2021: Commencement of Consulting Services
- October 2021: Pre-Design Phase Completion. A report describing the Project Scope was used to document a summary of the Pre-Design phase services.
- March 2022: Schematic Design Phase Completion. This report outlined the project understanding to document completion of the Schematic Design Phase
- June 2022: Confirmation of AHS operational funding and a private donation increased feasibility of the expansion proceeding.
- December 2022: Development Permit Submission – Discussions with the Town of Okotoks commenced in August at which time the Schematic Design Report was shared. We believe that the Town is supportive of the application and raised no red flags. Formal documentation for the Development Permit Application was submitted to the Town on November 17, 2022. On December 22, 2022 the Town confirmed that they have the information necessary to process the application. The Town has indicated that the





Application will require approval of Municipal Planning Commission which could happen in February 2023.

- December 2022: Design Development Phase Completion including FCHS board approval to proceed to Contract Documents Phase and use a construction management form of procurement. This will support subject matter expertise to optimize build design and costs and advise on how to minimize disruption to existing hospice operations during construction.

Future Milestones

- February – April 2023: Contract Documents and CM Preconstruction Services
- May – June 2023: Tender and award the project. This will be reviewed with the successful CM. Options to pretender long lead items and any other early procurement is of interest if deemed beneficial to the FCHS
- Summer 2023: Construction Phase
- Summer/Early Fall 2024: Complete construction and commissioning to allow services to commence. This timing will be further substantiated through the Contract Document and Pre-Construction Services Phase

3. Response Requirements

Provide the following information in a formal submission to meet the requirements and conditions herein:

3.1. Cover Letter

Each Proponent shall include a Cover Letter (1 page maximum), duly signed, that discloses the company's interest in pursuing this opportunity. Particular attention should be paid to the following points:

1. Confirm your understanding and intent to provide services as described in this RFP;
2. Summarize how/why your team is uniquely positioned to provide superior service before, during, and after the construction of the Project; and
3. Confirm your commitment to complete the Project, with the qualified team members identified in your formal submission;
4. Include the team lead's signature and appropriate contact information (including mailing address, phone, fax, and email).





3.2. Firm Profile

Provide a corporate overview of your company specifying the following (3 page maximum):

1. Legal name and head office location
2. Scope of operations and number of years in business
3. Your company and team's relevant construction experience on projects of comparable size, scope, and complexity with strong emphasis placed on the following:
 - a) Experience delivering projects through a Construction Management process providing Pre-Construction Services. Highlight applicable examples of projects accommodating complex residential care, expansions, and renovations
 - b) Projects meeting Standards of Alberta Health Services for similar projects
 - c) Projects of similar nature and scope – including analysis of problems/issues and how they were successfully resolved;
 - d) Related project experience(s) – examples of strategies or methodologies in past projects that resulted in a successful outcome for the project and stakeholders as a result of the pre-construction services provided.
4. Outline your firms approach to the following:
 - a) Pre-construction Services
 - b) Construction Phase Services
 - c) Streamlined and Effective Communication Strategies
 - d) Schedule Management Strategies
 - e) Strategies for minimizing disruption to existing operations related to renovations and expansion
 - f) Quality Assurance Program
 - g) Approach to Sustainability
 - h) Warranty Services
 - i) Insurance and Claims/Litigation History
5. Any unique qualifications of value-added considerations that may enhance your services

3.3. Personnel and Experience

Please provide the following information relative to your proposed project team (3 page maximum):

1. Identify the core personnel who will be assigned to the project. Identify their respective roles, qualifications, and experience.





2. Identify the Executive lead for the overall project and who will lead the preconstruction services phase
3. Identify the mechanical and electrical leads and or how M and E Subtrades will be coordinated
4. Identify the site supervisor who will both direct and be accountable for the performance of the construction team. Elaborate as to their relevant experience and summarize their past accomplishments on similar sites with similar projects.
5. Identify the cost estimator
6. Provide a proposed organizational chart describing proposed relationships between the various members of your team.
7. Describe how schedule, budget, BIM, sustainability, and quality control will be managed
8. Acknowledge commitment of the proposed team for the project and that written consent must be obtained from the owner for any changes to team members.

3.4. Project Experience

Please provide not less than three (3) reference projects, constructed by the Proponent, that are similar in size and scope to this project. Projects should address experience with complex residential care including new construction (additions) and renovations and those that include related support spaces for administration, food services, building systems, and related coordination of the site interface. Reference to recent work preferred (2 pages per project). For each referenced project, please provide:

1. Title and project description;
2. Project details;
3. Proponent team members;
4. Project challenges and approach to resolving these challenges; and
5. Project reference name and telephone number of Owner, who has knowledge of the project quality, budget and schedule.

3.5. Work Methodologies & Schedule

Provide a description of proposed work methodologies to be used by your team in collaboration with the Client and Consultant teams (3 pages maximum, not including organizational chart), as follows:





1. Describe an approach to proposed priorities and sequences for the Project
2. Describe an approach to successful communication strategies that may be employed with the owner and design team
3. Describe an approach to successfully mitigate supply chain issues (ex. Long lead items to avoid schedule delays and cost increases).
4. Describe any construction related services that will be self-performed
5. Describe an approach to managing site logistics during construction (ex. deliveries, staging, on-site offices, parking, phasing, etc) to ensure the project schedule is maintained, and minimizes impacts to the ongoing operations of the Foothills Country Hospice.
6. Describe the health and safety approach to mitigating COVID-19 transmission if applicable during the project which could result in loss of labour impacting the project schedule and completion.
7. Provide the approximate cost per month for general conditions
8. Provide a construction Schedule in Primavera or MS Project, which identifies the critical path of the Project and details your proposed Work Breakdown Structure (WBS). Identify key milestones to demonstrate your understanding of the sequence, duration, and interdependencies of key tasks necessary to meet the schedule and or to improve upon it. Specifically identify your initial anticipation of expected dates for substantial completion, commissioning & turnover

3.6. Full Disclosure

Proponents are required to provide a written statement of full disclosure addressing the following particulars:

1. Any business relationship with Foothill Country Hospice Society or, any of its employees, volunteers, officers, directors, or Board members;
2. Any matter in the last 5 years involving a legal dispute with a claim valued in excess of \$100,000, which is the subject of any current, pending, or threatened mediation, arbitration, or litigation proceeding;
3. Any matter in the last 5 years involving an insurance claim with a value exceeding \$100,000;
4. Any particulars of any proceedings involving the Proponent under the Bankruptcy and Insolvency Act (Canada), the Companies Creditor Arrangement Act (Canada) or similar legislation.





4. Response Rules and Evaluation

4.1. Response Rules

Please prepare your PDF submission addressed to Lindsey Lattoni at
llattoni@countryhospice.org

All submissions must be clearly marked:

Construction Management RFP response for the Foothills Country Hospice expansion and renovation

Up to three separate PDFs should be submitted including:

1. Proposal addressing the requirements outlined herein
2. Pricing including any value-added contribution
3. If relevant to your submission - any donations, sponsorships and/or in-kind contributions for the FCHS Compassion in Action expansion fund development campaign

The proposal and pricing will be scored according to the evaluation criteria. Donations will be considered, only after all vendors are ranked to ensure gifts to the hospice are at arms length and separate from the vendor evaluation process.

All submissions must be received by Tuesday January 31, 2023 at 4:30 pm hours (MST). Strict adherence to this deadline shall be maintained unless the deadline date is extended. All Responses received after this time and date will be disregarded. Each response must be duly signed and will be deemed irrevocable for sixty (60) days after the deadline date. As such all proponents are requested to provide copies of their response as an email attachment / FTP site access with the proposal saved in PDF format.

All Proponents shall forward their RFP submission and RFP Questions & Inquiries to the following:
Lindsey Lattoni @ llattoni@countryhospice.org

All inquiries and questions by Proponents during this RFP period shall be forwarded no later than January 18, 2023 at 12:00 hours (MST). Questions shall be reviewed by FCHS and the prime consultant (GGA-Architecture) for an appropriate response. Responses to questions shall be disclosed to all Proponents via email no later than January 24, 2023 at 12:00 hours (MST). Early submission of questions by Proponents is encouraged.

Issuance of this Request for Proposal in no way constitutes a commitment by the Owner to award contracts to any Construction Management company or to pay any costs incurred by the





Proponent in preparing a Response or otherwise in relation to this RFP. Any opened Responses and accompanying documentation submitted by the Proponent shall become the property of the Owner and will not be returned. No site walkthrough will be arranged.

4.2. Addenda and Amendments

This RFP may be amended only by an addendum in accordance with this section. Each addendum shall form an integral part of this RFP. Such addenda may contain important information, including significant changes to this RFP. Prospective Proponents are responsible for obtaining all addenda issued by the Owner.

Proponents may amend their responses prior to the closing date of this RFP by submitting the amendment by email to the designated contact, as identified in Section 4.1, with the subject line clearly replicated as per the "original" submission with the added Amendment Number. Any amendment should clearly indicate which part of the response the amendment is intended to amend or replace.

4.3. Proposed Procurement Schedule

Issue RFP	January 11, 2023
Last Day for Inquiries & Questions	January 18, 2023 at 12:00 hours (MST)
Last Day for Responses Issued to Proponents	January 24, 2023 at 12:00 hours (MST)
RFP Closes	January 31, 2023 at 16:30 hours (MST)
Conduct Interviews if Required	February 6 and 7, 2023
Contract Award	Mid February 2023

FCHS reserves the right to modify this schedule to support a competitive and appropriate procurement process.

4.4. Evaluation Criteria

Upon receipt of the Construction Management RFP responses, the Selection Committee will screen each submission to ensure compliance with the requirements of this Request. The





Selection Committee will determine the acceptance of any deviation at its sole discretion and reserves the right to accept any response deviation from the general requirements of the Request. The Selection Committee shall evaluate each pre-qualification submission.

The following evaluation criteria rubric will be used to rate various requirements for evaluation purposes. No totals, scores, or rankings shall be released to any Proponent. The Owner reserves the right to seek submission clarification with any Proponent to assist in its evaluation process.

RESPONSE REQUIREMENT	POINT ALLOCATION
5.1 Cover Letter / Project Understanding	5%
5.2 Firm Profile	5%
5.3 Personnel & Experience	15%
5.4 Project Experience	20%
5.5 Work Methodologies & Schedule	25%
5.6 Full Disclosure *	0%
5.7 Bid and Procurement Forms **	0%
5.8 Fee Schedule (Submit as a separate PDF)	25%
5.9 Contract Security, Insurance and Safety	5%
TOTAL	100%

Note:

* While no score is allocated to 5.6 Full Disclosure, Proponents must acknowledge requested information by either providing disclosure or confirming no encumbrance.

** While no score is allocated to 5.7 Bid and Procurement Forms, Proponents must complete them in full and submit them back as part of RFP process, if incomplete or not submitted, proponent will be disqualified from the RFP process.

4.5. Acceptance / Rejection of RFQ Responses

Upon evaluation of all valid responses, the selection committee will select the Proponent that offers the most beneficial qualifications deemed to be in the best overall interest of the Owner.





The name of the successful proponent shall be made available only to participating Proponents upon finalization of a contractual agreement to proceed. No act of the Owner, or selection committee other than a notice in writing, shall constitute an acceptance of a response.

The Owner and its representatives reserve the right to cancel this RFP at any time and to reject any or all Proposals for any reason and without explanation or compensation to the Proponents.

The Owner and its representatives reserve the right not to consider the merits of any proposal not submitted in accordance with the requirements stated in this RFP.

4.6. Confidentiality

Confidentiality & Security of Information

The Proponent shall:

Keep strictly confidential all information concerning the project and/or third parties, or any of the business or activities of the project and/or third parties acquired as a result of participation in this RFP;

Only use, copy or disclose such information as necessary for the purpose of submitting a Response or upon written authorization of the Owner; and

Maintain security standards, including control of access to data and other information, consistent with highest standards of business practice in the industry.

Further to the above, all documentation and information obtained by proponents in connection with this Request are the property of the Owner and must be treated as confidential and shall not be used for any purpose other than responding to this RFP. The proposal and any accompanying documentation submitted by the proponents shall become the property of the Owner and shall not be returned.

All information related to the project is owned by the Owner and is not to be communicated to the media or third parties without prior written approval of the Owner.

FOIP and Collection of Personal Information





The purpose of collecting the Personal Information requested in this RFP is to enable the Owner to ensure the accuracy and reliability of the Response, to enable the Owner to evaluate the company's Response to this RFP. Authority for this collection is located in section 33(c) of FOIP.

FOIP applies to all information and records relating to, or obtained, generated, created, collected, or provided under, the RFQ and/or the Contract(s) and which are in the custody or control of the Owner.

All documents submitted to the Owner are governed by the access and privacy provisions of FOIP. While FOIP allows persons a right of access to records in the Owner's custody or control, it also prohibits the Owner from disclosing personal information or confidential business information. This prohibition takes effect if disclosure would be significantly harmful to a firm's business interests or would be an unreasonable invasion of personal privacy as defined in sections 16 & 17 of the Act. Firms are encouraged to identify those portions of their submission which they are submitting in confidence and which, if revealed, would harm the business interested of the firm.

Protection of Privacy

FOIP imposes an obligation on the Owner, and through the RFP and related Contract(s), on the pre-qualified company, to protect the privacy of individuals to whom information relates.

By submitting personal information, the company consents and shall obtain the consent of the firm's Resources and any individuals referred to in the Response, to the disclosure of Personal Information for the purposes to verify professional standing and to conduct reference checks, if needed.

All costs associated with meeting the company's requirements of FOIP, as set out in this RFP will be borne by the company.

4.7. Extensions

The Owner may, by addendum, extend the deadline date for a period of not more than five (5) days without affecting the acceptance period described above.

4.8. Further Information

It is the Construction Manager's responsibility to clarify interpretation of any terms in the Request prior to submitting their proposal. Questions shall only be submitted in writing via email. Questions and responses shall be circulated to all companies.





Appendix A: FORM OF CONTRACT and CM SCOPE OF SERVICES

The Owner wishes to create a team environment whereby all stakeholders work toward the creation of a high-quality hospice facility which optimizes the capital investment. It is anticipated that the Construction manager will be engaged using a CCDC 5B form of contract negotiated to be mutually beneficial to both parties. The following outlines anticipated Services for Pre-Construction and Construction Phases.

CM's Scope of Services – Pre-Construction

Establish a Project Plan

1. Coordinate and report to the Owner on all activities and findings. Develop a written scope of work defining all project elements including general trade scope and a procurement strategy based on cost savings and certainty.
2. Develop a preliminary risk register for the project to be maintained and updated throughout the project duration to close out.
3. Provide site specific occupational health and safety and environmental regulations and company policies.
4. Review design and assess constructability and coordination issues related to site access, phasing, site mobilization, or any other constraints noted by the Construction Manager. Provide comments and a plan to mitigate the identified risk areas.
5. Provide a plan to assist with the permit and approval strategy required to perform the Construction Works (such as crane permits). The Architect will manage the Building Permit process.
6. Develop written Policies & Procedures, in conjunction with the Owner's internal reporting requirement, of how the Project Plan Summary is administered and methods in which all Project Team Deliverables will be delivered, monitored and tracked. This document will include policies and procedures for:
 - a) Advice to the Owner and Consultant on Cost Management.
 - b) Bidding and award protocols and procedures and drafting of trade contracts (note that Owner involvement in trade awards and pre-bid meetings is Mandatory).
 - c) Invoicing procedures for all trades including provision for prompt payment.
 - d) Quality Management Procedures for all work including the work of Trade contracts.
 - e) Commissioning procedures.
 - f) Occupancy and Move in Plan.
 - g) Close-out / turnover requirements / Tenant Work Coordination.





- h) Other procedural issues specific to the project.
7. Analyze the various technical and construction resources and governing agencies (except design-related consultants) that will be required to implement the project.
 8. Develop a process / methodology for BIM integration.
 9. Develop a summary of the reporting mechanisms (e.g. Schedules, Budgets, Communication methods, etc.) required to effectively manage the project.
 10. Assess or develop procurement strategies and volume discount structures both as part of the Construction Manager's ongoing work.
 11. Produce a schedule with detailed WBS to construction activities, and highlight opportunities for phasing, acceleration, or areas of risk (slippage) to the schedule to the Owner and Project Team Members.
 12. Produce an overall organization chart for the project outlining roles and responsibilities for all Project Team Members.
 13. Define necessary reports and summaries that the Owner will require to monitor project progress and performance.

Perform Site-Specific Due Diligence

1. The Construction Manager will work closely with the Owner and the Project Team to develop appropriate site due diligence, all site conditions which have an impact on cost, timing and quality of the project will be included in such consideration.
2. Perform desktop review of reports available from consulting engineers with regards to site due diligence analysis to determine the site's existing condition including subsurface investigations and other means, which may have an impact on cost, timing, and quality of the project.
3. Provide written findings of due diligence process so that the Owner can make informed decisions.

Capital Cost Model

1. Although the Owner has retained a Cost Consultant for the Project to the end of the Design Development Phase, the selected Construction Manager will independently prepare and manage the construction budget from the commencement of the preconstruction services.
2. The CM, Owner and Consultant team will develop specific deliverables for the capital cost model upon commencement of the services.





3. Review the initial cost estimates and provide feedback to the Owner and Consultant team on any questions or opportunities for value engineering. It is anticipated that the feedback will consider but not be limited to the following:
 - a) Division 1 costs.
 - b) Trade-by-trade construction breakdown including ongoing allowances for undefined elements or unknown but foreseeable conditions, reconciliation with actual costs and contingencies.
 - c) Other expenses forming part of the remaining soft costs for the Project as applicable.
 - d) Establish cost alternatives and potential value engineering opportunities.
 - e) Analysis of current marketplace constraints, costs and cost drivers. With recommendations on pre-emptive methodologies to avoid cost and schedule delays and increases respectively, to ensure project budget and schedule is maintained.
 - f) Identify potential procurement opportunities for materials and products.
 - g) Analysis of how site conditions, and mobilization logistics will affect the Financial Model.
 - h) Provide preliminary cash flow projections based on the preliminary Critical Path Implementation Schedule.
 - i) Present the cost estimate report, including any required reconciliation analysis to the Owner current internal budget target.
4. The Owner has engaged the Services of a Cost Consultant with whom the Construction Manager shall cooperate fully throughout the life cycle of the project with the Cost Consultant.

Coordination During the Construction Document Phases

1. Coordinate with the Architect and Consultants on design coordination, constructability, completeness and accuracy in the preparation and submission of Construction Documents and submission for Building Permit(s). Attend design coordination meetings, and assist in resolving design conflicts, Building Information Modelling (“BIM”) clashes, errors, omissions and furnish to the Owner a regular design coordination report appropriate to the stage of design.
2. The Construction Manager will be an active resource and leader in the development of all design and construction documentation for the Project. Deliverables will include the following:





- a) Assist the design and technical consultants with obtaining all necessary project information and the Owner's design goals.
- b) Attend regular meetings with the Owner and Project Team to discuss design plans and concepts.
- c) Perform independent design evaluations with a particular focus on Budget and Schedule compliance and provide advice to the Owner and Project Team regarding the design.
- d) Refine the Budget as the program and design details are formulated and establish the final budget with the Owner's approval and conduct Value Engineering as directed by the Owner.
- e) Refine the Project Schedule and incorporate complete details of all integrated activities including development of options and alternatives for consideration by the Owner.
- f) Monitor the production of all design documentation for technical completeness and Project Schedule adherence.
- g) Prepare a formal technical review of the design documentation prior to trade tender (Issued for Tender – IFT documentation); this will include detailed commentary on a discipline by discipline basis with a presentation to the Owner and Design team Goals include; confirmation of constructability, coordination of design with tendering strategy and mitigation of risk against future change orders which will increase cost and schedule.

Manage Pre-Construction Tasks

1. While the construction documentation is produced, the Construction Manager will develop trade bid, negotiation and buyout strategies. Specifically, deliverables during this activity will include the following:
2. Develop construction trade bidding and awarding strategy for review and approval by the Owner.
3. Develop program for defining and procuring long lead materials and equipment.
4. Develop, in conjunction with the Project Team, unit prices specific to the Project for competitive bidding.

CM's Scope of Services – Construction

Select Construction Team

1. Lead the effort of competitively soliciting proposals and retaining the required Trade Contractors. The Owner may provide suggested list of Trade Contractors and Suppliers.





The Construction Manager is to evaluate the feasibility of these candidates based on anticipated schedule performance, quality and cost and accept for inclusion in the procurement process and interest and readiness to provide bids. Deliverables will include the following steps for procuring the services of any professional consultants, vendors and Contractor yet to be retained for the project:

- a) Produce a list of recommended disciplines and pre-qualify specific firms yet to be considered for the project.
- b) Develop and issue project-specific requests for proposal and pre-qualifications documents.
- c) Provide full tender summaries of all bids received by trade contractors per discipline inclusive of a full bid leveling summary and recommendation summary form to be accepted and signed by owner prior to issuing any letters of awards or issuing any CCDC 17 trade contracts.
- d) Schedule and conduct interviews with the appropriate potential candidates to better assess the specific team(s) offered. Conduct competitive bid process, with pre-award meetings and provide written results and recommendations to the Owner for approval. Owner attendance at bid openings and pre-award meetings is mandatory.
- e) Advise the Owner and make recommendations on particular firms suited for the project.
- f) Provide draft contracts and agreements for the Owner's review.
- g) Prepare and conduct contract negotiations in accordance with the Owner's requirement. Note that the Owner's approval will be required at each stage.

Manage Budgets and Schedules

1. As part of the overall project effort, the Construction Manager will oversee, manage, and regularly report on Budget and Schedule performance including the following:
 - a) Identify and Mitigate Project Risk throughout the life cycle of the Project maintaining and issuing a Risk Register to the Owner and the Project Team.
 - b) Prepare and submit schedule template and format of monthly report structure to Owner for review and acceptance prior to first issuance.
 - c) Based on the agreed template, prepare and maintain on a monthly basis a cost and resource loaded schedule, sharing native format (.xer / .mpp) with the Owner for review and analysis. Such reporting should highlight project issues, cost management details, and schedule variances relative to baseline and schedule recovery planning.





- d) In coordination with the Owner and Architect, manage the timing and administration of jurisdictional approvals required for prosecution of the work such as MOE, lane closures, road cuts, groundwater discharge etc.
- e) Manage Budget and financial performance of the project including review, validation, rationalization and negotiation of any change orders resulting in cost decreases or increases to the project.
- f) Provide the Project Team with clear validation for the value of change orders, in a timely manner.
- g) Conduct quality, cost and schedule management meetings on a regular basis providing budget and schedule performance summary information for presentation to the Owner. Experience in Lean Construction and Pull Planning practices is considered an asset.
- h) The Owner has engaged the Services of a Cost Consultant with whom the Construction Manger shall cooperate fully throughout the life cycle of the project with the Cost Consultant.
- i) The CM/GC is responsible for the scheduling of all activities related to the Work. Provide bi-weekly updates of the Project Schedule reflecting the actual progress of the Work. Any proposed changes or foreseeable events, which impact the construction delivery schedule are to be brought to the immediate attention of Altus Group. Meet all contracted milestone delivery dates in the Project Schedule.
- j) All project schedules shall be supplied to Altus Group in Microsoft Project or Primavera format.
- k) Move activities and project close-out.

Manage Trade and Vendor Invoicing and Payment.

- 1. The Construction Manager will provide general project construction accounting and provide the Owner with 'audit ready' documentation and processed invoices for payment to the Owner's satisfaction. This effort will specifically include the following:
 - a) Administer the review and payment process of all project invoices and Owner construction requisitions and enter all date into the Cost Tracking Workbook.
 - b) Coordinate and communicate with all project vendors regarding their financial terms and billing to the Owner.
 - c) Negotiate payment terms with all vendors and assist the Owner with managing monthly cash flow.
 - d) Ensure compliance of all payments with pre-negotiated terms and agreements.





- e) Prepare monthly analysis to capture cash flow projections vs. actual expenditures and reforecast cash flows as required.
- f) Establish and maintain “books and records” for audit purposes as required by Owner. Provide all required financial data to Owner through electronic and hardcopy means.
- g) Coordinate efforts and provide reports to the Owner’s in-house financial staff and its Accountant.

Monitor Project Build-Out Activities

- 1. The Construction Manager will lead the effort of overseeing and monitoring the actual construction and fit-out the Project. Specific responsibilities will include the following:
 - a) Supervise the overall build-out effort and coordinate the efforts of the Project Team;
 - b) Provide frequent onsite representation as required, to monitor build-out progress and provide design and technical quality;
 - c) Coordinate the integration and installation of furniture, fixtures, equipment and technology with construction activities;
 - d) Develop strategy to monitor and report on work progress, field activities and project exceptions;
 - e) Monitor and report on any work required of Owner as part of lease requirements;
 - f) Coordinate communications with Owner relating to all work and required building services during construction;
 - g) Monitor actual costs versus Budget and report on all financial status matters;
 - h) Conduct regular progress meetings as required to coordinate construction activities;
 - i) Meet with and report to Owner and Project Team on all installations;
 - j) Manage completion of all punch lists prepared by the Project Team;
 - k) Develop and oversee testing, burn-in and commissioning procedures of all equipment and systems;
 - l) Occupancy Permits, coordination of partial occupancy, deficiency corrections, move-in scheduling and condominium registration activities;
 - m) Manage by all site forces with occupational health and safety regulations and company policies. The Construction Manager will be deemed to be a “Constructor” within the meaning of the Occupational Health & Safety Act (Alberta).

Project Commissioning

- 1. Plan and manage commissioning to ensure that all life safety, building automation, vertical transportation, security, lighting and other control systems are fully tested and commissioned and integrated to meet contract specification provisions and the





requirements of Authorities Having Jurisdiction to avoid delays in Occupancy or property management problems;

2. Plan and manage property management training to ensure seamless transfer of the building and its systems to the Owner and Project Manager.

Project Close-Out Activities

1. Assist the Project Manager and the Owner to prepare a final Construction Cost Report. Once Project build-out is complete, the following tasks will be required to properly close-out the project:
 - a) Ensure that the contractors and installation vendors complete all punch list;
 - b) Cooperate with Pre-Delivery inspections to be undertaken by the Owner or a nominated 3rd party.
 - c) Coordinate and complete pre-PDI inspection issues and rectification of Consultant inspection / deficiency reports.
 - d) Acquire all project reference materials including warranties, training, attic stock, manuals, as-built drawings and operations and maintenance requirements.
 - e) Manage the effort of obtaining all final approvals, certificates of occupancy and acceptance from authorities having jurisdiction.
 - f) Prepare any final materials and documents required by Owner.
 - g) Close-out and settle all contractual obligations with contractors and Project Team members.
 - h) Secure lien release from all contractors, consultants and vendors.
 - i) Perform financial reconciliation of all project costs and expenses.
 - j) Obtain any financial incentive monies and /or tenant improvement contributions from the Owner, if applicable, as well as any credits due from the Contractor.
 - k) Prepare final package of close -out documents for the Owner that may be required by lease terms.
 - l) Prepare final comprehensive financial and schedule performance metrics for the Project.
 - m) Provide final written summary reports of all project elements.
 - n) Provide assistance as required to Owner for any required registrations.
 - o) Manage and coordinate any current lease restoration requirements.
 - p) Manage all Division 1 materials and equipment not consumed during construction.

