



**Dufferin-Peel Catholic District School Board**

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**Information Manual for Architects**

for

**ELEMENTARY AND SECONDARY SCHOOLS**

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**Prepared by the Design Department**



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## **1. PREAMBLE**

- 1.1.1. Your firm has been awarded a commission with the Dufferin-Peel Catholic District School Board. Whether your firm is new to the Board, or whether your firm is an "old hand" in providing consultative services, this Information Manual should be read and followed, thus making the design process smoother and easier for both you, and the Design Department staff.
- 1.1.2. This document identifies the expectations of the Design Department staff as you proceed through the numerous phases of the Work. It is not meant, in any way, to supersede the *Client/Architect Agreement* and the Board's *Supplementary Conditions*. (Copy of *Supplementary Conditions* is included on the Design Department's Web site.)
- 1.1.3. Because of the number of projects in any given year that the Design Department staff must co-ordinate with its Consultants, it is best to establish standard procedures, preventing certain watershed items to "fall between the cracks".
- 1.1.4. You should note that the Board operates two distinct departments, supervised by two different managers in providing accommodation. The first is the Design Department, which will co-ordinate your efforts through design, site plan approval process, Contract Documentation, and tender phase.
- 1.1.5. Upon completion of the tender phase, and following Board approval of the project tender, you will be dealing with the Construction Department. This Information Manual encompasses the requirements of the DESIGN DEPARTMENT ONLY.
- 1.1.6. Notwithstanding the above, during the Construction Phase (Contract Administration) the Architect shall submit to the Design Department a monthly summary of *Notices of Change* (or similar wording) for each project, providing a short summary of the NOC and identifying the author and reason for the Notice of Change.

## **2. ARCHITECT'S BASIC SERVICES**

- 2.1.1. The Architect's basic services consist of the four phases identified below plus Contract Administration Phase (details not included in this Information Manual) and include structural, mechanical, electrical and civil engineering services, as well as the obtaining of the Municipality's Site Plan Approval, Building Permit and other such permits as required by the Authorities Having Jurisdiction.
- 2.1.2. The Architect's basic services shall also include, but not be limited to, other consultative services such as kitchen, hardware, site grading design, site servicing & irrigation systems, theatrical lighting & rigging, and services of sound and cost consultants as identified in the Board's *Client/Architect Agreement*, its *Supplementary Conditions* and any other written agreements between the Board and the Architect.

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- 2.1.3. The Architect's basic services include the co-ordination required to integrate all parts of the service.

### 3. CLIENT/ARCHITECT AGREEMENT

- 3.1.1. The Architect shall prepare the Client/Architect Agreement, and include, without alteration, the *Supplementary Conditions* required by the Board. *It must be noted that until the Client/Architect Agreement is executed to the satisfaction of the Design Department, Architect's invoices will not be processed.*
- 3.1.1.1. The *Supplementary Conditions* entitled *Schedule C, Article 6 Other Conditions* must be appended to, and shall form part of, the *Client/Architect Agreement*. This Schedule C is included on the Design Department's Web Site.
- 3.1.2. The Board expects that in parallel with the signing of the *Client-Architect Agreement*, the Architect's firm and its Sub-Consultants shall execute a standard *Form of Agreement between Architect and Engineer for Professional Services* and shall execute a standard OALA Form of Agreement between Architect and Landscape Architect for Professional Services.
- 3.1.3. The executed agreements between the Architect and Sub-Consultants and the Architect and Landscape Architect must clearly include the Board's minimum requirements, expected services, terms of reference, scope of work, and other additional services that are required by the Architect for the completion of the Project. The minimum requirements for Sub-Consultants and Landscape Architect are listed at the end of this *Information Manual*.

### 4. FEE FOR BASIC SERVICES

- 4.1.1. The fee for the Architect's basic services *for new projects* shall be based on the *Outline of Services and Schedule of Recommended Fees* as issued by the *Ontario Association of Architects* dated January 30, 1988.
- 4.1.2. The Design Department, prior to the commencement of the Schematic Design Phase, shall negotiate a fee for smaller additions and renovations.
- 4.1.3. The Design Department, prior to the commencement of the Schematic Design Phase shall negotiate the fee for repeat projects. (Refer to "Repeat Design Fee," this Information Manual.)
- 4.1.4. For NEW PROJECTS, the fee calculation, payable to the Architect, shall be based upon the Contract Price, *excluding* G.S.T., as adjusted at the completion of the work, and any written approved change orders that document the following:
- 4.1.4.1. Corrections to the Contract Documents, with respect to the work of the Architect and all applicable Consultants

4.1.4.2. Previously issued \* Board requests for changes to the Documents that may require co-ordination with work of all applicable Consultants.

- Prior to approval of Contract Documents

4.1.5. The fee for the Architect's basic services is based on a stipulated sum tender (less GST) and shall be apportioned to the phases of service as follows:

Schematic Design Phase	Eight percent	( 8%)
Design Development Phase	Twelve percent	(12%)
Contract Document Phase	Forty percent	(45%)
Tender Phase (Bidding or Negotiation)	Five percent	( 5%)
Construction Phase (Contract Administration)	Thirty percent	(30%)

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**TOTAL** **100%**

4.1.6. The calculation of fees of the first four phases is based on the Board's established Construction Budget and fully adjusted to the Board's accepted Contract Price following Tender.

4.1.7. Fee payments during the first four phases of the Architect's services as outlined above shall be in proportion to the services performed within that phase and fully adjusted at the time of Tender.

4.1.8. Fee payments for the construction phase of the Architect's services shall be based on the Certificate of Payment as approved by the Architect for the CERTIFIED AMOUNT which is gross value of work, less Holdback, less Reserve Fund, and less G.S.T.

4.1.9. The remainder of the fee for the Architect's services shall be paid, upon release of the holdback and the Reserve Fund, (Refer to "Reserve Fund," this *Information Manual*.)

## **5. REPEAT DESIGN FEE**

5.1.1. The Architect's fee on a Repeat Design of a previous Project shall be calculated on the fee identified in the *Outline of Services and Schedule of Recommended Fees* as issued by the *Ontario Association of Architects* dated January 30, 1988, AND as a result of negotiations with the Design Department. As part of the repeat fee, the Architect shall include in the Contract Documents all previously issued, written instructions, requests for changes, and Change Orders to the documents.

5.1.2. The Architect shall ensure that such instructions and changes, including those of applicable Consultants, are *fully coordinated* throughout the drawings and specifications.

## 6. BILLING PROCEDURES

- 6.1.1. During all the various phases of Work, all of the Architect's original invoices shall be submitted to the Design Department for approval and payment, using the format approved by the Design Department.
- 6.1.2. The Architect should note that payment of invoices shall be withheld until certain procedures and schedules are completed and submitted by the Architect. The completed procedures and schedules upon submission of which, payment of invoices depend, is identified in this *Information Manual*, and elsewhere in the attached documents.
- 6.1.3. *During construction*, Architect's invoices must be accompanied by a copy of the Contractor's Certificate of Payment, and any other documents necessary to support the calculation of payment must correspond to the Contractor's Certificate.
  - 6.1.3.1. Include, as an appendage to the Contractor's monthly draw, documentation verifying the unspent cash allowances. The Architect's invoice shall reflect this calculation.

## 7. BUDGET

- 7.1.1. At the start of the project, (Schematic Design Phase) the Board **and/or the Architect** shall establish the Construction Budget. The Budget shall be based on an area of similar school size and type, times the currently acknowledged cost per square foot including allowances but excluding GST.
- 7.1.2. The Architect must declare, ***in writing***, that the original budget calculation as prepared by the Board is acceptable and that the Architect will design the project and prepare Contract Documents within these established parameters.
- 7.1.3. At the beginning of the Design Development Phase, the Architect will confirm the original budget or, with the approval of the Design Department, amend it to reflect possible increases/decreases. To amend the Budget will require written documentation acceptable to Design Department.
- 7.1.4. As a MINIMUM, at Sketch Plan Approval, as well as at 50% and again at 80% of the completion of the Contract Document Phase, the Architect will review and update, in writing, the Budget as established at the Design Development Phase. \*
- 7.1.5. To amend the Budget at either of these stages will require written and comprehensive documentation acceptable to the Design Department.
  - 7.1.5.1. \*The Budget outline should identify in detail, the components of construction & their corresponding costs, (i.e. unit costs, percentage of unit costs etc.) and related cost per square foot evaluation. Other

information to be provided includes gross floor area of building, total cost per sq. foot, details of allowances, etc.

- 7.1.6. Should the Budget be exceeded at the Tender Stage by more than (8% for new Elementary Projects and 5% for new Secondary Projects) the conditions of the already executed Client/Architect Agreement, including the Supplementary Conditions required by the Board, shall apply, or, the Board may elect to renegotiate the fee.
- 7.1.7. The Budget is to include a breakdown of all trades and divisions. Work of the Mechanical and Electrical trades must be included in the breakdown.
- 7.1.8. Each item listed in the Budget must identify cost per square foot and percentage of the overall Budget

## **8. SCHEMATIC DESIGN & DESIGN DEVELOPMENT PHASE**

### **8.1. GENERAL**

- 8.1.1. The Architect shall study the Board's Academic Program Requirements, Project Schedule, instructions as furnished by the Design Department, the Design Department's Web Site, and the characteristics of the proposed school site.
- 8.1.2. The Architect shall review with the Design Department, alternative approaches to the design of the Project and the types of construction contracts.
- 8.1.3. The Architect shall review all applicable statutes, regulations codes, by-laws, health and safety legislation etc. and review the same with "Authorities Having Jurisdiction" as required.
- 8.1.4. Based on the mutually agreed upon program requirements, the Design Department's instructions and Construction Budget, the Architect shall prepare, to the Design Department's satisfaction, schematic design documents to illustrate the scale and character of the Project and how the parts of the Project functionally relate to each other.
- 8.1.5. The Architect shall prepare, to the Design Department's and other staff's satisfaction, a series of drawings indicating floor plans and elevations. These drawings shall be discussed and altered as required to correspond to the Program requirements and to the Board Guidelines.
- 8.1.6. The floor plans must indicate, both in metric and imperial measurement, the area sizes of program spaces specifically identified in the Academic Program Requirements. Any variance in sizes of rooms must be identified and approved by the Design Department before proceeding further with the design.

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### 8.2. INSURANCES

- 8.2.1. If requested by the Design Department, the Architect shall provide a copy of the firm's, as well as the chosen Sub-Consultants', liability and errors/omissions insurance.

### 8.3. CORRESPONDENCE

- 8.3.1. The Design Department prefers to receive and send correspondence and other pertinent information via its E-Mail, but with attachments in Word or PDF Format only. (E.g. not ClarisWorks) Faxed messages should be kept to a minimum.

### 8.4. PROJECT SCHEDULE

- 8.4.1. The Architect shall complete the Project Schedule that shall be carefully monitored, updated monthly and submitted with the Monthly Report. This is to be a *pro-active procedure* by the Architect. (Refer to sample of Project Schedule on the Design Department's Web site.)

### 8.5. MONTHLY PROJECT REPORTS

- 8.5.1. The Architect shall prepare, and E-Mail, **promptly**, at the end of each month, the *fully completed Monthly Project Report* to give the Design Department's staff a "thumbnail" sketch of the project. (Monthly Project Report is included on the Design Department's Web site and is available in an electronic format.)

- 8.5.1.1. A brief, written summary outlining the monthly activities must accompany the Monthly Report.

### 8.6. MEETING SCHEDULE

- 8.6.1. Generally, the reviews of the development of Schematic Design & Design Development and until the completion of the sketch plans, meetings shall be held approximately every two weeks and shall be established at the first design meeting. (Refer to "Schedule of Design Meetings," this information Manual.)

### 8.7. AGENDA

- 8.7.1. The Architect shall prepare an agenda for every meeting with Board's representatives and E-Mail to the Design Department's secretary for distribution, at least one full working day prior to the meeting.

- 8.7.2. The Agenda will be in two parts: The first will deal with design and academic issues of interest to Principals and Superintendents. The second part will identify discussion items such as budget, fees, schedules, approvals etc. and **may** be discussed separately with the Design Department.

#### **8.8. MINUTES OF MEETINGS**

- 8.8.1. The Architect shall prepare and forward Minutes of Meeting, within five (5) working days, for every meeting with the Board's representatives and for all major meetings between the Architect & Consultants and E-Mail to the Design Department's secretary. (*Attachments must be in a Word or PDF format.*)

#### **8.9. TOPOGRAPHICAL, GEOTECHNICAL AND OTHER SURVEYS**

- 8.9.1. The Architect shall request, from an approved list, quotations from at least four (4) surveyors/geotechnical consultants to provide services based on the Design Department's standard minimum criteria. (Submission of a Quotation for Survey Criteria is included on the Design Department's Web site.)
- 8.9.2. Once the bids are received, copies will be forwarded of ALL correspondence and quotations to the Design Department, with a letter of recommendation for approval. If the recommendation is other than for low bidder, the Architect must include a rationale for the recommendation.
- 8.9.3. The Architect shall make certain that the Design Department receives an electronic copy and three hard copies of topographical surveys, *with original signatures and seal*, and, unless otherwise required, two original copies of geotechnical report.
- 8.9.4. Original invoices from the *Architect* will be forwarded to the Design Department for payment, along with a letter indicating recommendation for payment and confirming completion of the work. The Architect should make surveyors and environmental/geotechnical sub-consultants aware that any invoices mailed directly to the Design Department will be returned.
- 8.9.5. From time to time, projects will require additional surveys such as traffic, sound, asbestos, archeological etc. The same process as identified above is to be followed by the Architect.

#### **8.10. PREPARATIONS FOR BOARD APPROVAL - SKETCH PLANS**

- 8.10.1. Approximately three (3) weeks prior to the scheduled Board Meeting, the Architect will E-Mail PDF's indicating floor plan(s) elevation(s) a location map, and an

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optional perspective all in an 8½" x 11" (black and white) format. (Refer to "Required Drawings for Sketch Plan Approval," this *Information Manual*.)

- 8.10.2. Cost analysis and other pertinent information required by the Design Department are to be included with the original sets of plans, as a separate attachment. (This information is not intended to be submitted to the Board as part of the sketch plan package.)
- 8.10.3. The sketches will be included with the Recommendations for Approval prepared by Design Department staff.
- 8.10.4. Attendance at the Board meeting is mandatory. As directed by the Senior Administration, the Architect should be prepared to answer questions from the Trustees, describing, among other items, the salient features of the design.

## 9. CONTRACT DOCUMENT PHASE

### 9.1. GENERAL

- 9.1.1. Upon the approval by the Board of the *Sketch Plans* and based on the approved schematic design documents and approved estimate of Construction Cost, the Architect shall prepare, to the Design Department's satisfaction, Contract Documents consisting of drawings and specifications setting forth in detail the requirements for the construction of the Project.
- 9.1.2. TENDER SET OF CONTRACT DOCUMENTS is to be submitted to the Design Department a *MINIMUM of full ten (10) working days prior to the start of the bidding period*. (Refer to "Drawings" and "Specifications," this *Information Manual*.)

### 9.2. SITE PLAN APPROVAL PROCESS

- 9.2.1. The Site Plan Approval process by the Municipalities within the Region of Peel is onerous, complicated and long. Therefore, as soon as practical, and even before the approval of Sketch Plans by the Board, it is incumbent upon the Architect to commence the Site Plan Approval process.
- 9.2.2. The Board's Planning Department assigned staff member shall support the Architect in the process, but the Architect must note the following:
  - 9.2.2.1. The Architect is to ascertain whether preliminary discussions with the Municipality based on sketch plans are mandatory and play a pro-active role in pursuing the site plan approval through the various stages and processes.

- 9.2.2.2. The Architect should also note that City Departments such as Planning and Traffic Safety Council may provide diametrically opposite instructions to the Architect and these must be resolved by a series of meetings.
  
- 9.2.3. It is the responsibility of the Architect to follow up with each individual City Department, and, if needs be, to physically advance project plans from department to department on a continuous basis. Waiting until a City Department confirms that the drawings/details have been reviewed and approved is an unacceptable time line. The Architect must be pro-active in attempting to obtain the Site Plan Approval and Building Permit Approval as noted in the Schedule.
  
- 9.2.4. The Architect is to provide copies of all his/her submissions to the Municipality, as well as copies of responses from that Municipality to the Design Department AND the planner assigned to the Project.

### **9.3. SITE PLAN APPROVAL - LANDSCAPE DESIGN**

- 9.3.1. It is to be noted that the Landscape Architect's initial design is to meet only the MINIMUM standards of the Municipality in which the project is located.
  
- 9.3.2. Prior to submitting the landscape design to the Municipality for site plan review, the Landscape Architect must obtain approval of the design by the Design Department.

### **9.4. LIST OF FORMS REQUIRED BY MUNICIPALITIES**

- 9.4.1. In conjunction with the first Site Plan and Building Permit submission, each Municipality requires the accompaniment of various Forms and Declarations. Each of these required Forms and Declarations must be filled out by the Architect as completely as possible prior to forwarding them to the Design Department for signature and execution.
  - 9.4.1.1. Forms and Declarations submitted to the Design Department that contain blank spaces which could have been easily, and to the best of the Architect's ability and knowledge, filled in, will be returned.
  
- 9.4.2. At the commencement of the Contract Document Phase, the Board will provide a "Letter of Authorization" indicating that the Architectural Firm is authorized to act as an agent for the Board. (City of Brampton has a "Letter of Undertaking" form which will need to be completed by the Architect and submitted to the Design Department for signature and execution.)
  
- 9.4.3. The following is a presently known list of forms required by the Municipalities. These forms are identified here for information only, and it is the Architect's responsibility to ascertain which forms are currently used by each of the

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Municipalities within the Regions of Dufferin and Peel. These are in no particular order, and do not necessarily apply to each Municipality.

Environmental Site Screening Questionnaire and Declaration Form  
Commitment to General Reviews by Architect and Engineers  
Application for Building Permit to Construct  
Site Plan Undertaking Form  
Traffic Safety Council Site Plan Review Sub-Committee Questionnaire

- 9.4.4. The Architect must note that plans of school additions MAY need approval from the Ontario Fire Marshal. If required, the Architect is to obtain such approval and forward a copy of it to the Design Department.

### 9.5. CORRESPONDENCE, PROJECT SCHEDULES, AGENDA AND MINUTES

- 9.5.1. Requirements identified in the Schematic Design and Design Development Phase also apply to this phase of the work.

### 9.6. CONTRACT DOCUMENT PREPARATION

- 9.6.1. The Architect will submit Contract Documents to the Design Department for comments. Meetings will also be arranged to review Contract Document material. The Architect will obtain instructions from the Design Department for the preparation of necessary bidding information, bidding forms, conditions of the Contract and the "Form of Tender". (Refer to *Contract Document Forms* on the Design Department's Web site.)
- 9.6.2. The Architect will advise the Design Department on the inclusion of separate tenders that the Design Department may require inclusion in the Contract Documents.
- 9.6.3. The Architect shall review all current statutes, regulations, codes and by-laws applicable to the design, including conformance with ASHRAE and OHSAA recommendations. Where necessary, the Architect shall review same with the Authorities Having Jurisdiction in order that all required consents, approvals, licenses and permits necessary for the Project may be applied for, and obtained by the Architect, or the Contractor, as the case may be.
- 9.6.4. In case of additions, and renovations/additions, the Architect, as part of the basic professional service, shall prepare measured drawings and verify the accuracy of drawings or other information furnished by the Design Department in order to expeditiously proceed with the Project.
- 9.6.5. From time to time, the Design Department may require the Architect to research different components on specific projects. Such research will be included in the Architect's basic services.

**9.7. RESERVE FUND**

- 9.7.1. The Specifications should include that *The Schedule of Values* required by the *General Conditions* provides for the establishment of a *Reserve Fund* equivalent to the value of 1% of the Work performed, such fund shall be held in an interest-bearing trust account in the name of the Board and paid to the Contractor at the time of final completion of the Work.
- 9.7.2. This Reserve Fund is in addition to any required *Construction Lien Holdback* and accrued funds shall be subject to claims by the Board and others as provided for under the terms of the Contract Documents.

**9.8. COLOUR CODING OF BID SUBMISSION DOCUMENTS**

- 9.8.1. The Board has initiated standard colour coding of its Bid Submission Documents:

9.8.1.1. * Form of Tender	GREY
* Supplementary Information Form }	
* Supplementary Conditions for GC 3.6.1 }	PINK
* To be signed and executed by the General Contract Bidder	
⌘ Mechanical Supplementary Bid Form }	
⌘ Electrical Supplementary Bid Form }	BUFF
⌘ To be signed and executed by all the Mechanical & Electrical Bidders	
Instructions to Bidders	BLUE
Supplementary Gen. Conditions to CCDC 2, 1994}	
General Instructions }	WHITE
All Specifications and Detail Sheets }	
Addendum No. 1	GREEN
Addendum No. 2	YELLOW
Addendum No. 3	PURPLE
Addendum No. 4	LIME
Addendum No. 5	ORANGE

## **10. PREQUALIFICATION PROCESS**

### **10.1. GENERAL CONTRACTORS**

- 10.1.1. The Architect will prepare a draft of the *Prequalification Advertisement* for Design Department approval. (Refer to the sample of the ad on the Design Department's Web site) The Architect will inform the Design Department of the cost of the ad.
- 10.1.2. Upon approval of the ad and its cost, the Architect will arrange and co-ordinate publication in the Daily Commercial News (DCN) and the local, municipal newspaper.
  - 10.1.2.1. This advertisement in the DCN shall run for two consecutive days and one day (preferably Wednesday) in the local, municipal newspaper.
- 10.1.3. The Architect will receive all submissions from General Contractors by the established date, review each qualification based on Board's standards and requirements, and summarize results in advance of a review meeting with Board staff.
- 10.1.4. The Architect will meet with Board staff and review the results of the submissions and make recommendations to the Board staff. To expedite a proper review, a minimum of 3 references are required for each candidate.
- 10.1.5. Once the review is completed, the Architect will advise, in writing, all General Contractors, individually, whether or not their submission was acceptable. The Design Department is to be copied.
- 10.1.6. The Architect will prepare a draft of the *Tender Information Advertisement* for Design Department approval. (Refer to sample of ads on the Design Department Web site.) The Architect will inform the Design Department of the cost of the ad.
- 10.1.7. Upon approval of the ad and its cost, the Architect will arrange and co-ordinate publication in the Daily Commercial News (DCN) and the local, municipal newspaper.
  - 10.1.7.1. This advertisement shall run for one day in both the DCN and in the local, municipal newspaper.
- 10.1.8. Payment of the ads will be on original invoices and will be forwarded to the Design Department for payment *by the Architect*, along with a letter indicating recommendation for payment.
- 10.1.9. Refer to the sample of "Advertisements" on the Design Department's web site and follow the format as noted.

## 10.2. MECHANICAL AND ELECTRICAL SUB-CONTRACTORS

- 10.2.1. The prequalification process for Mechanical and Electrical Sub-Contractors is similar in nature to the one for General Contractors, except that this process involves the Architect, as well as the Architect's Mechanical and Electrical Consultants.

## 11. TENDER PHASE

### 11.1. GENERAL

- 11.1.1. The Architect shall prepare the specifications to complete the Project in the firm's preferred format. The "Front Part" sections of the *Contract Documents*, however, are to be produced by the Architect following the Board's format. (Refer to Contract Documents.)

### 11.2. DOCUMENTATION

- 11.2.1. The Board has prepared standard text formats for the following:

*Form of Tender, (general tender)*  
*Supplementary Information Form,*  
*Supplementary Conditions*  
*Instruction to Bidders,*  
*Mechanical/Electrical Bid Submission Forms*  
*General Instructions, Supplementary Conditions for GC 3.6.1 of the CCDC 2,*  
*Supplementary General Conditions to CCDC 2 – 1994*

- 11.2.2. All of the Consultants are encouraged to use the above formats and may request either a hard, or electronic copies.

### 11.3. ARCHITECT'S RESPONSIBILITIES

- 11.3.1. The above documents are for the purposes of format and text standardization and are not to be used verbatim without careful review and necessary modification by the Architect, as deemed necessary. They are to be used as a guide ONLY. Inclusion of the enclosed sections does not relieve the Architect or the Architect's Consultants of their professional responsibilities.
- 11.3.2. Whether or not a particular section of the documents is changed/ amended/added to or portions deleted by the Consultant, once included in the Contract Documents, **these will become the responsibility of the Consultant as if they were prepared by the Consultant in total.** The Board will not accept any responsibility for errors or omissions in the Contract Documents based on this enclosed format.

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- 11.3.3. Clauses such as "**This section was prepared by the Board**" or other such disclaimers will not permitted to be included by the Architects in their Contract Documents.

### 11.4. METHODOLOGY

- 11.4.1. For ease of reference, the Architect's documents will be compared to the Board's Standard Format. The Architects are encouraged to read the Board's Documents and make appropriate changes as they see fit, but are requested to use the same format.
- 11.4.2. The Architect should note that the shaded areas (grey on hard copy, yellow on electronic and Web copy) will require specific information to be inserted, depending on the project. The shaded areas require insertion for times of closing of tender, bond percentages etc. Shaded areas also prompt addition/deletion and amendments as required by the Architect. All shaded areas are to be deleted prior to printing of the forms.

### 11.5. GENERAL TENDER (FORM OF TENDER)

- 11.5.1. Refer to the Design Web site under "Contract Documents" for sample of the *Form of Tender*.
- 11.5.2. The *Form of Tender* is to be submitted to the Board's offices at a designated date and time by (normally prequalified) General Contractors.
- 11.5.3. The *Form of Tender* is to be opened in public, shortly after the close of tender, by a designated Trustee, in the presence of the Board's Administration.
- 11.5.3.1. The Architect's presence is mandatory at the actual opening of tenders.
- 11.5.3.2. The Architect shall provide a spread sheet indicating the names of the known and/or pre-qualified General Contractors to record tender information for all present.
- 11.5.4. Staff will open the sealed envelopes in the presence of a Trustee to ascertain the inclusion of appropriate bonding information. Once confirmed that all bonding information is in place, staff will offer both the *Form of Tender* and bonding information to the Trustee for announcement of tender price.
- 11.5.5. After all of the *Forms of Tender* are opened, the low Tenderer will be recognized by Trustee Motion "pending Board approval and Architect's analysis." No detailed discussion of the Tenders will be carried out in the Board Room.

- 11.5.6. The Architect will gather all of the opened Tenders and take them to his/her office for review. One copy of the three lowest General Contractors' tenders (including copies of all bonds) shall be faxed to the Design Department by a previously agreed upon time.

#### **11.6. SUPPLEMENTARY INFORMATION FORM**

- 11.6.1. Refer to the Design Web site under “Contract Documents” for sample of the *Supplementary Information Form*.
- 11.6.2. The *Supplementary Information Form* is to be submitted only by the Low Tenderer to the offices of the Architects on the day following the close of General Tenders (Bid Submission) on or before the designated time identified on the form.
- 11.6.3. The Architect is to amend the *Supplementary Information Form* to ensure that it complies with the requirements of the Specifications.
- 11.6.4. The Architect must note that a minimum of three names of suppliers is to be listed for each category in the *List of Suppliers*.
- 11.6.5. Generally, the preferred selection(s) should be in bold font with alternate names in regular font. The Contractors are to be instructed that the name of supplier/installer is to be circled and if not circled, the name identified in bold lettering shall be used. Where “equal” suppliers are named, all three should be in bold font.
- 11.6.5.1. The above format is to be followed for the Mechanical and Electrical Supplementary Bid Submission Forms as well.
- 11.6.5.2. In case of masonry, the list is to identify specific and approved sizes and colours of brick from each supplier listed.
- 11.6.5.3. In case of interior finishes, the list is to identify sizes and material thicknesses from each of the suppliers listed.

#### **11.7. SUPPLEMENTARY CONDITIONS**

- 11.7.1. Refer to the Design Web site under “Contract Documents” for sample of the *Supplementary Conditions Form*.
- 11.7.2. The *Supplementary Conditions*, (Refer to *Contract Documents*) properly signed and executed, shall be submitted simultaneously with the Supplementary Information Form, to the offices of the Architect(s) on the day following the close of the General Tenders.

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### 11.8. MECHANICAL & ELECTRICAL SUPPLEMENTARY BID SUBMISSION FORMS

- 11.8.1. Refer to the Design Web site under “Contract Documents” for sample of each of the *Supplementary Bid Submission Forms*.
- 11.8.2. The Consultants are to specify that the *Mechanical Supplementary Bid Submission Form* and the *Electrical Supplementary Bid Submission Form* must be submitted by (normally prequalified) Sub-Contractors directly to the (normally prequalified) General Contractors.
- 11.8.3. The low General Contractor, on the day following the close of General Tenders, shall include with the submission of his/her *Supplementary Information Form*, the *Mechanical and Electrical Supplementary Bid Submission Forms* from the Sub-Contractors named in his/her *Form of Tender*.
  - 11.8.3.1. Copies of mechanical and electrical bonds are to be included with the submission.
- 11.8.4. Each of the Supplementary Bid Submission Forms is to include Mechanical/Electrical Equipment List, with bold lettering for the preferred selection(s). The Sub-Contractors are to be instructed that the name of supplier/installer is to be circled and if not circled, the name identified in bold lettering shall be used.

### 11.9. BUILDING MANAGEMENT SYSTEM BIDS

- 11.9.1. Unless directed otherwise by the Design Department, CONTROLS (Building Management System) will be submitted as a separate division to the ***Mechanical Sub-Contractor***.

### 11.10. LETTER OF RECOMMENDATION

- 11.10.1. Generally, within 24 to 48 hours after the receipt of the *Supplementary Information Form*, the *Supplementary Conditions*, and the *Mechanical/Electrical Bid Submission Forms (including bonds)* from the low Tenderer, the Architect is expected to prepare and submit a *Letter of Recommendation* for the acceptance of the Tender. If the recommendation of acceptance is not for the low bidder(s), a detailed explanation must accompany the recommendation.
- 11.10.2. Attached to, but separate from, the Architects' *Letter of Recommendation* must be a fully completed and annotated Spread Sheet indicating various cost breakdowns required by the Design Department.
- 11.10.3. Based on the Information provided by the Architect, staff will prepare a recommendation of tender approval by the Board.

- 11.10.3.1. Attendance by the Architect at the Board Meeting that has the approval of Tender on the Agenda is mandatory.

## 12. POST TENDER PHASE

- 12.1.1. If the project addenda are extensive in volume and scope to an extent that their inclusion, in the opinion of the Design Department, will adversely impede the ability of the General Contractor to construct the project in a timely and cost effective manner, the Construction Department MAY require the Architect and his/her Consultants to issue a new set of Contract Documents clearly identified "FOR CONSTRUCTION".
- 12.1.2. The "FOR CONSTRUCTION" Contract Documents shall include ALL addenda issued during the tendering period and all post tender revisions and changes as a result of negotiations between Contractor and the Board.
- 12.1.3. Should such Contract Documents be necessary, the Architect shall provide a copy of the drawings and specification for the exclusive use by the Construction Department.

## 13. DRAWINGS

### 13.1. DRAWINGS - GENERAL

- 13.1.1. The Architect shall produce the graphic portions of the Contract Documents, including Drawings and Details, on "Auto-Cad", Latest Version. The medium for data transfer to the Design Department shall be by hard copy.
- 13.1.2. Tender/Contract sets of full size drawings for **all phases** of the work must be no larger than 30" x 40" (760 mm x 1000 mm).

### 13.2. PROGRESS DRAWINGS – SCHEMATIC DESIGN PHASE

- 13.2.1. For each scheduled design meeting, prepare for review, five sets of drawings of size no greater than 280 mm x 435 mm (11" x 17"). Drawings must comprise in part, or all of a site plan, floor plans and, at a later stage of development, exterior elevations.

### 13.3. PROGRESS DRAWINGS – DESIGN DEVELOPMENT PHASE

- 13.3.1. Drawings must comprise of more detailed site plan, preliminary landscape plans, floor plan(s), interior room elevations and finalized exterior elevations etc.

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- 13.3.1.1. For each scheduled design meeting, prepare for review, five sets of drawings of size no greater than 280 mm x 435 mm (11" x 17").
- 13.3.1.2. In addition to submitting the sets of drawings at each scheduled meeting, the Architect may consider power point presentation.
- 13.3.2. Prepare a preliminary exterior material component list, drawings and samples for review.

**13.4. REQUIRED DRAWINGS FOR SKETCH PLAN APPROVAL**

- 13.4.1. For sketch plan approval by the Board, E-Mail, in a PDF format to the Design Department plans, indicating a location map, site plan & statistical information, floor plan(s) elevation(s) and an optional perspective in an 8½" x 11" (black and white) format.
- 13.4.2. The location map should indicate general location of the site, identifying major streets and orientation. "Google" type map reproductions are unacceptable. Pertinent building and the site data and information, should be identified in an imperial as well as metric format.
  - 13.4.2.1. Floor plan and site plan lettering must be oversized so that it is clearly legible when reproduced in the small (8½" x 11") page format. Corridors should be lightly shaded to identify the access pattern. For legibility, millwork or other details are not to be incorporated in individual areas of the building.
- 13.4.3. In addition to the material included in the Board agenda, also prepare large size coloured renderings on presentation boards of the project's floor plan(s), elevation(s) and perspective, to be prominently displayed on the Architect's easels, a minimum of fifteen (15) minutes prior to the Board Meeting.

**13.5. REQUIRED PROGRESS DRAWINGS – CONTRACT DOCUMENT PHASE**

The required progress drawings identified below is for new school construction. For additions/alterations, review with the Design Department the number of drawings required.

- 13.5.1. At 50% - 75% of Contract Document preparation, provide:

One set of Architectural drawings	Three quarter size
Specialized drawings (kitchen, site work, etc.)	Three quarter size
One set of electrical drawings	Three quarter size
Room Finish schedule (if available)	8½" x 11" format
Door and Frame schedule (if available)	8½" x 11" format
Millwork details (if available)	8½" x 11" format

- 13.5.2. At 80% - 95% of Contract Document preparation, provide:
- TWO sets of drawings, Architectural, Landscape, Structural, M. & E. and applicable specialized areas as a CHECK SETS: Three quarter size
- |  |                  |
|--|------------------|
| Room Finish schedule                   | 8½" x 11" format |
| Door and Frame schedule                | 8½" x 11" format |
| Millwork/sections and building details | 8½" x 11" format |
- One additional set of Mechanical Drawings full size
- Two additional sets of Electrical Drawings full size
- One electronic copy (PDF) of Site Plan for portable location comment
- One copy of floor plans for Custodial comment three quarter size

### **13.6. DRAWINGS - TENDER PHASE**

- 13.6.1. For the Tender Phase of the project, provide to the Design Department:
- ONE (1) complete set of drawings, Architectural, Landscape, Structural, Mechanical & Electrical and applicable specialized areas: FULL Size
- TWO (2) complete set of drawings, Architectural, Landscape, Structural, Mechanical & Electrical and applicable specialized areas: Three quarter Size
- TWO (2) copies of Detail Books\* as applicable 8½" x 11" format
- \* Detail books to contain door and screen schedules & details and room finish schedule.
- 13.6.1.1. Front and rear page of the three quarter size drawings are to be LAMINATED.
- 13.6.2. Prior to Tendering, the Architects are to provide to the Design Department for approval, a "*List of Tender Printing Requirements*" suggesting the type and number of drawings and specifications to be printed.
- 13.6.2.1. For a Typical Format of the Tender Printing List refer to the attached Appendix 1 at the end of this Manual.

### **13.7. DRAWINGS - CONSTRUCTION PHASE**

- 13.7.1. The number of drawings and specifications, including addenda will be determined by the Construction Department at the initial meeting between Board Construction Staff and the Architect.
- 13.7.2. However, items 1.5.2 and 1.5.3 of the Supplementary General Conditions to CCDC 2 -1994 identifies that the Board will furnish to the General Contractor, free of charge, up to 20 sets of drawings; up to 10 sets of specifications, and up to 10 prints of detailed drawings.

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- 13.7.3. These prints and specifications will be in addition to the signed triplicates of the Contract Documents, sets required to obtain permits or licenses required for the execution of the Work and sets for record drawings. All other copies of drawings and specifications, if required by the General Contractor or Sub-Contractors, may be purchased from the Consultant at the cost of printing and delivery.

### 13.8. DRAWINGS - POST CONSTRUCTION PHASE

- 13.8.1. **At Project completion, provide the following:**
- 13.8.1.1. An "As Built" set of all drawings in an "AutoCAD" format.
  - 13.8.1.2. PDF Plots of the complete set of drawings.
- 13.8.2. **This electronic material is to be forwarded to the Board's Plant Department, specific address to be determined.**

## 14. SPECIFICATIONS

### 14.1. SPECIFICATIONS - GENERAL

- 14.1.1. Other than the "Front Part" of the Specifications, the Architect shall produce the written portion of the Contract Documents on "*Microsoft Word for Windows*", in the CONSTRUCTION SPECIFICATIONS INSTITUTE. – CONSTRUCTION SPECIFICATION CANADA – MASTER FORMAT - latest version.
- 14.1.1.1. Format of hard copy Specifications shall be 8½" x 11" with coloured paper for *Form of Tender* and *Supplementary Information Form* etc., as outlined in this Manual.
  - 14.1.1.2. Bind Architectural Specifications, Detail Book, and Mechanical Specifications, & Electrical Specifications SEPARATELY.

### 14.2. SPECIFICATIONS - CONTRACT DOCUMENT PHASE

- 14.2.1. At 50% - 75% of Contract Document preparation, provide:  
One copy of "Front Part" of the Specifications
- 14.2.2. At 80% - 95% of Contract Document preparation, provide:  
Two complete sets of specifications  
One additional set of Mechanical Specifications  
Two additional sets of Electrical Specifications

**14.3. SPECIFICATIONS - TENDER PHASE**

- 14.3.1. For this phase, provide the following:
  - One set of Specifications and Detail Book(s) bound to Architect's standard.
  - One set of Specifications, UNBOUND, THREE HOLE PUNCHED.
- 14.3.2. Unbound set of Specifications and Detail Book(s) are to have LAMINATED front and back covers.

**15. SCHEMATIC DESIGN & DESIGN DEVELOPMENT - REVIEW SCHEDULE**

**15.1. SCHEDULE OF DESIGN MEETINGS**

- 15.1.1. Generally, the reviews of the development of Schematic Design and Design Development, and until the completion of the Sketch Plans, meetings shall be held approximately every two weeks. These meetings will be attended by the Principal of the firm and Architect's staff as deemed necessary. Representing the Board will be Design and Planning Department staff, Superintendent of Schools, Principal (if appointed) and, on occasion, senior staff members and Trustee(s) may attend.
  - 15.1.1.1. Meeting schedule will be established at mutually agreed upon time at the first pre-design meeting. The first pre-design meeting will be between Design Department and Architect only.

**15.2. MECHANICAL/ELECTRICAL BRIEF**

- 15.2.1. At the start of the Contract Document preparation, but no later than three (3) weeks after Board approval of Sketch Plans, the Architect's Consultants shall prepare and E-Mail to the Design Department, a MECHANICAL/ELECTRICAL BRIEF.
  - 15.2.1.1. The brief is to be in an 8½" x 11" PDF format.
- 15.2.2. The BRIEF shall be circulated and a meeting shall be convened by the Design Department secretary within approximately 10 working days of receipt.
- 15.2.3. Following receipt of this Design Brief, the Design Department shall schedule a meeting with the Architect, Consultants, and Board Staff to review the prepared material.
- 15.2.4. At the scheduled meeting, the Consultants must prepare at least preliminary, single line mechanical (HVAC) diagrams, showing the proposed mechanical system as described in the Brief.

## **16. CONTRACT DOCUMENT PHASE - REVIEW SCHEDULE**

### **16.1. COMMENTS BY DESIGN DEPARTMENT**

- 16.1.1. As the preparation of Contract Document progresses, ad hoc meetings between the Design Department staff and Architect/Consultants will take place when issues or questions arise. Oftentimes, faxed sketches or E-mailed plans describing certain aspects of the design can be discussed over the phone or by E-Mail.
- 16.1.2. Throughout the Contract Document Phase, meetings will be arranged by the Design Department as deemed required or as necessary, to discuss specific areas and disciplines. These meeting will be scheduled by the Design Department's secretary.
- 16.1.3. For Secondary Schools, the Architect shall prepare separate 11" x 17" drawings of each of the disciplines within the school, showing floor plan and all interior elevations, millwork sections and details for comment by the Design Department. Based on the Board approved Guideline, these sketches may be vetted and signed off by School's Heads of Department at a number of meetings attended by the Architect and Design Department staff. These meetings will be scheduled by the Design Department secretary.
- 16.1.3.1. However, a number of SCHEDULED meetings will be identified on the "*Projects Schedules*" format at the following critical junctures:
- 16.1.4. At approximately 50% to 75% completion, confirm to the Design Department the date of the scheduled meeting to review, with the Design Department the progress of the work. For detailed requirements of materials to be presented, refer to "*Drawings*" and "*Specifications*".
- 16.1.4.1. Note: Depending on the size of the project, the 50 - 75% scheduled meeting may not be necessary. Instead, information submittals to the Design Department may be sufficient to review the Architect's progress.
- 16.1.5. At approximately 80% - 95% completion but within two weeks of submittal, confirm to the Design Department the date of the scheduled meeting with the Design Department, and other Board Departments, to review the progress of the work. Final set of Tender Documents for issue to General Contractors will be based on the comments of all of the Board Departments listed below.

### **16.2. INFORMATION SESSION FOR THE CONSTRUCTION DEPARTMENT**

- 16.2.1. At the time of the submission of Tender Documents to the Board, the Design Department MAY require the attendance of the Architect, and possibly the Consultants, at an information session with the Construction Department staff.

**16.3. MECHANICAL/ELECTRICAL COMMENTS BY PLANT/CONSTRUCTION DEPARTMENTS**

16.3.1. 80% - 95% Plant/Construction Department Mechanical/Electrical comments:

16.3.1.1. The Consultants shall provide drawings and specifications in quantity as identified in *Drawings* and *Specifications – Contract Document Phase*.

16.3.1.2. Within two weeks of submittal, the Architect may be required to meet with Plant/Construction and other Board Departments to review these departments' comments on the Mechanical and Electrical Contract Documents.

**16.4. ELECTRICAL COMMENTS BY THE BOARD'S ICT DEPARTMENT**

16.4.1. 80% - 95% ICT Department's comments of Computer Requirements:

16.4.1.1. The Consultants shall provide a set of electrical drawings showing conduit and back box locations for the computer system. (Wiring and devices are to be tendered post General Tender.)

16.4.1.2. Within two weeks of submittal, the Architect and Consultants may be required to attend a meeting with ICT/Design to review the ICT Department's comments on the Contract Documents.

**16.5. CUSTODIAL AND PORTABLE LOCATION/ACCESSIBILITY COMMENTS**

16.5.1. 80% - 95% Comments by Board's staff dealing with custodian issues and portable accessibility & location:

16.5.1.1. The Consultants shall provide drawings in quantity as identified in *Drawings* and *Specifications – Contract Document Phase*.

16.5.1.2. The Board's Custodial Staff will comment on the Architect's compliance of such items as design of oversized/double doors or removable mullions for ease of access for exterior and interior machinery, the location and shape of custodian rooms in accommodating ride-on floor cleaning equipment and the inclusion of eye wash stations as per the Guidelines.

16.5.1.3. Plant staff dealing with relocation of portables will comment on location of future portables and unhindered access to this location.

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### **16.6. THEATRE CONSULTANT'S REVIEW**

#### 16.6.1. 80% - 95% Board's Theatre Consultant's review:

- 16.6.1.1. The Board employs a Theatre Safety Consultant who will review the drawings for compliance of rigging safety ONLY. The consultative fee for this service is paid directly by the Board.
- 16.6.1.2. The Architect shall make arrangements with the Theatre Consultant to review the Contact Documents at the Architect's offices. The Theatre Consultant will submit a report to the Architect and the Design Department.
- 16.6.1.3. Suggestions by the Theatrical Consultant that exceed, or are in contravention of the Board's Guidelines, will not be incorporated into the Contract Documents without specific and prior approval from the Design Department.

### **16.7. FIELD IRRIGATION CONSULTANT'S REVIEW**

#### 16.7.1. 80% - 95% Board's Field Irrigation Consultant's review:

- 16.7.1.1. The Board employs a Field Irrigation Consultant who will review the drawings for compliance the Board's Field Irrigation Guideline. The consultative fee for this service is paid directly by the Board.
- 16.7.1.2. The Architect shall make arrangements with the Field Irrigation Consultant to review the Contact Documents at the Architect's offices. The Consultant will submit a report to the Architect and the Design Department.
- 16.7.1.3. Suggestions by this Consultant that exceed, or are in contravention of the Board's Guidelines, will not be incorporated into the Contract Documents without specific and prior approval from the Design Department.

## **17. COMMISSIONING**

- 17.1.1. On both Elementary and Secondary School projects the Board may appoint a Commissioning Authority to, verify, and document the performance of the facility and its various mechanical and electrical systems, and ascertain the design intent and the functional and operational needs of the Board.

## **18. ADDENDA**

- 18.1.1. As soon as an Addendum is prepared, the Architect is to submit two (2) ORIGINAL copies of each Addendum to the Design Department, on appropriately coloured paper.
- 18.1.2. One of the copies of the Addenda to be unbound, 3 HOLE, PUNCHED. (While addenda are usually faxed to the General Contractors to save time, it is acceptable to only send original copies on the appropriately coloured paper to the Design Department.)

## **19. LETTER OF INTENT**

- 19.1.1. Upon authorization to do so by the Manager of Design, a Letter of Intent will be forwarded by the Architect to the General Contractor.
- 19.1.2. Authorization for the Letter of Intent will be given only when the Board is confident that the issuance of the Site Plan Approval, the Building Permit, and other permits required by the Authorities Having Jurisdiction is imminent.
- 19.1.3. To avoid potential delay claims by the General Contractor, the Letter of Intent must be forwarded within the tender validity period.

## **20. GUIDELINE CONTRAVENTION**

- 20.1.1. *Changes to drawings or specifications - either pre or post tender - required by the Municipalities or Authorities Having Jurisdiction as a condition of site plan or building permit approvals, but which are in contravention to, or inconsistent with the Board's Design Guidelines and/or Design Department's instructions, must be immediately reported in writing to the Design Department.*
- 20.1.2. The Design Department is to be given the opportunity to question unreasonable or what it considers to be unsafe, or inappropriate, requests by the Municipality rather than merely acquiescing to them.
- 20.1.3. Should the Design Department determine that the Municipality's request would be detrimental to the safety of staff and/or students or compromise the academic process, or for other reasons, the Design Department will ask the Architect to convene a meeting with the Municipal staff to discuss such requests.
  - 20.1.3.1. Included should be items such as deletions/additions of walkways, changes of material to garbage enclosures, changes in grading, relocation and alignment of parking spaces and location of barrier free spaces, changes to elevations, location of gates, fencing, additional planting beyond municipal standards, etc., etc.

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- 20.1.4. Prior to the submission of Landscape plans to the Municipality, the Architect and/or the Landscape Architect must review the plans with the Design Department.

### 21. NOC/CCO'S AND SITE INSTRUCTIONS

- 21.1.1. In addition to copies of NOC/CCO's and Site Instructions forwarded to the Construction Department, issue one copy of the same information to the Design Department.
- 21.1.2. The copies may be FAXED or E-Mailed to the Design Department's secretary.
- 21.1.3. Each NOC/CCO and Site Instructions must have the following information:
- |            |   |
|------------|---|
| BACKGROUND | (Why change may be required)                      |
| REFERENCES | (List attached supporting letters, drawings etc.) |
| REASON     | (i.e. project coordination etc.)                  |
| ORIGIN     | (Who initiated CCO)                               |

### 22. CASH ALLOWANCES

#### 22.1. GENERAL

- 22.1.1. The applicable conditions to Cash Allowances are listed in the CONTRACT DOCUMENTS – *General Instructions*. These are as a suggested placeholder only and should be amended by the Architect as appropriate.
- 22.1.2. The items to be carried in the Specifications as Cash Allowances are to be listed without specific dollar amounts. Only the total Cash Allowance value is to be included and identified in the Contract Documents.
- 22.1.3. With the exception of the remaining cost of Building Permit, (Refer to Building Permit Allowance, this Manual) the Architects should specify that all other fees, deposits, charges, permits, licenses etc. as required by the Authorities Having Jurisdiction are to be included in the Stipulated Sum Tender Amount by the General Contractor.
- 22.1.3.1. If the Architects elect to list such fees, deposits or charges, it must be abundantly clear that these may not constitute all charges applicable to the project.
- 22.1.4. Connections for school purchased electrical and mechanical items such as dishwashers; stoves and secondary school shop equipment are to be included in the Contract – not as a Cash Allowance.

- 22.1.5. Rough-ins for all systems identified either as a Cash Allowance or supplied and installed during the construction phase or following the completion of the building are included in the Contract. (Refer to Design Guidelines for details.)
- 22.1.6. All washroom accessories are in the Contract. For types, quantity and location, refer to “Washroom and Classroom Sink Accessories” in the *Technical Guidelines*.
- 22.1.7. Finish Hardware Allowance is for SUPPLY ONLY, tendered post General Tender. Specify that the General Contractor will be responsible for the installation of hardware, either directly by the General Contractor’s forces or by a hardware installation sub-trade. The only exception are the Auto Operators (supply and install) and Permanent Cores (supply and install)
  - 22.1.7.1. It should be noted that Millwork hardware is to be included in the Millwork section of the specification. Only the locking hardware for the door height cupboards in both secondary and elementary schools are to be included in the Hardware Allowance.
- 22.1.8. In order to provide adequate information to the hollow metal supplier, and the General Contractor regarding expected hardware installation, the Architect should include in the Tender Documents a Finish Hardware section FOR INFORMATION ONLY.
- 22.1.9. Included with the Finish Hardware section in the Tender Documents must be a hollow metal/steel door & frames specification.

## **22.2. CONTINGENCY ALLOWANCE**

- 22.2.1. Contingency Allowance IS NOT TO BE INCLUDED in the Tender Amount on any construction contracts for this Board.

## **22.3. BUILDING PERMIT ALLOWANCE**

- 22.3.1. At the time of the application for Building Permit, the City of Mississauga and the City of Brampton Building Departments require a deposit. To facilitate the application, the Architect shall pay the deposit fee and recoup it as a disbursement from the Board. If time allows, the Architect can request the Board to prepare a cheque for the deposit.
  - 22.3.1.1. For projects in the Municipalities of Mississauga and Brampton, therefore, the BALANCE of the Building Permit fee is to be included in the Cash Allowances.
- 22.3.2. At the time of the application for Building Permit, the Town of Caledon, requires that the Building permit fee, + processing fee be paid in full. The Board will issue a cheque in the full amount to be included with the building permit submission.

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- 22.3.2.1. For projects in the Town of Caledon, therefore, Building Permit Fee is NOT to be included in the Cash Allowances.

### 22.4. ALLOWANCES CARRIED IN DIVISIONS 15000, 16000 AND 17000

- 22.4.1. Allowances are NOT TO BE INCLUDED in Divisions 15000, 16000 and 17000. All Cash Allowances are to be listed and carried in Division 1000.

### 22.5. INSPECTION AND TESTING ALLOWANCES

- 22.5.1. Inspection and Testing Allowances are listed in the *General Instructions* of the Contract Documents. The list of Inspection and Testing Allowances is a suggested placeholder only and should be amended by the Architect as appropriate.

## 23. LIST OF “BACK CHARGED” ITEMS

- 23.1.1. Certain items are included in the contract (supply and install) but back charged to the School’s Furniture and Equipment (F & E) budget. For information purposes only, the costs of the supply and installation of these items are to be identified POST TENDER, but prior to the first General Contractor’s draw.
  - 23.1.1.1. The Architect is to prepare a list of items that must be costed by the General Contractor. (Refer to the *Supplementary Information Form Design Guidelines* for details.)
  - 23.1.1.2. Copies of this list are to be submitted to both the Construction and Design Departments.

## 24. COSTS IN THE BASE BID RELATING TO SITE PREPARATION

- 24.1.1. The Board requires that the Architects provide a list in the *Supplementary Information Form* identifying any items in the Original Contract/Tender price relating to site preparation beyond the norm or for work outside of the Contract limit to be costed by the General Contractor
  - 24.1.1.1. Costs of the supply and installation of these items is for information purposes and are to be identified POST TENDER, but prior to the first General Contractor’s draw.
  - 24.1.1.2. Copies of this list are to be submitted to both the Construction and Design Departments.

## **25. DOOR & ROOM FINISH SCHEDULES**

- 25.1.1. The Architect shall produce Door and Room Finish Schedules in a separate binder, or as part of the "Details" book. *Do not print these on the drawings.*

## **26. COLOUR SCHEDULES**

- 26.1.1. All information and details necessary to complete the Colour Schedule are to be included in the Contract Documents for Tender. Unless otherwise directed by the Design Department, the Architect shall complete the Colour Schedule within eight (8) weeks from the approval of the Tender by the Board. Dates for meetings to review the Colour Schedule are to be identified in the Project Schedule.
- 26.1.2. The Architect shall prepare a spread sheet with ALL pertinent information to complete the Colour Schedule. A minimum of three (3) suppliers MUST be identified for each item and will be reviewed with the Design Department.
- 26.1.3. The final Colour Schedule shall be in an 8½" x 11" format, properly labeled, in a standard binder. One copy for the use by the Design Department is required.
- 26.1.4. The Colour Schedule must be supported by floor plans and interior elevations, clearly marked indicating accent wall colours and colours of floor patterns, (if any).
- 26.1.5. A Room Finish Schedule with material summaries and reference numbers of chosen suppliers must accompany the Colour Schedule.

## **27. SIGNAGE**

- 27.1.1. The Architect shall prepare details of the EXTERIOR SIGNAGE for Design Department comment and approval. (Refer to the Secondary and Elementary School Guidelines for details.)
- 27.1.2. INTERIOR SIGNAGE shall be prepared by the Architect, in concert with the Construction Department and the Principal or Principal Designate and shall be carried as an allowance in the Contract. (Refer to the Secondary and Elementary School Guidelines, Technical Text for Signage and Illustrative Sketches for details.)

## **28. WORK HOURS**

- 28.1.1. Work in all schools occupied by students or staff, (including summer school) whether additions, renovations or for deficiency corrections in new schools, are outlined in the Contract Documents, *Instructions to Bidders*.

**29. INSURANCES COVERAGE FOR VACATED SCHOOLS**

29.1.1. On Projects where the Board has vacated the premises and handed the building and/or property to the general Contractor, specify in the *Instruction to Bidders* that it is the responsibility of the General Contractor, as part of the Bid Submission to carry an insurance policy that includes, in addition to the value of the Contract, the value of the existing building and property.

29.1.1.1. Such Insurance Policy is to remain in effect until the completion of the Work as certified by the Architect.

**30. WEB SITE**

30.1.1. All Consultants should note that the attachments identified below may be viewed and printed from the Design Department's Web site, [www.dpcdsb.org/design](http://www.dpcdsb.org/design)

**31. ATTACHMENTS**

31.1.1. STANDARD FORMS are included on the Design Department's Web site. Upon request, the following documents can be E-Mailed in Microsoft Word or PDF Formats

Supplementary Conditions to the Client/Architect Agreement  
Typical Format for Monthly Project Report  
Typical Format for Project Schedules  
Typical Format for Advertisements  
Standard Text Guideline for Topographical & Geotechnical Surveys

31.1.2. TECHNICAL GUIDELINES are available on the Design Department's Web site. The Architect and the Architect's Consultants should become familiar with these documents prior to starting any project for the Board.

31.1.3. DESIGN GUIDELINES and corresponding Addenda are available on the Design Department's Web site and form the basis of all project designs for the Board and the Architect must be thoroughly versed in every aspect of these Guidelines. These are as follows:

Secondary School Guidelines (Design Criteria and Fitments)  
Elementary School Guidelines (Design Criteria and Fitments)

31.1.4. ILLUSTRATIVE SKETCHES are also included on the Design Department's Web site and are for both Elementary and Secondary Schools. These sketches are for illustrative purposes only, and are not to be scaled or copied.

31.1.5. BULLETINS deal with changes to the Elementary or Secondary School Guidelines, Standard Forms or Standard Text Guidelines requiring the Architect's attention prior to official revisions being made to the aforementioned documents.

- 31.1.5.1. The Bulletins will be E-Mailed to the Architects identifying all previous instructions/clarifications in that year with new items identified in red font.

## **32. SUB-CONSULTANTS**

### **32.1. LIST OF SUB-CONSULTANTS**

- 32.1.1. The Architect will put forward a suggested list of Mechanical, Electrical, Structural Sub-Consultants and Landscape Architect for the Design Department's comment.
- 32.1.2. Based on discussions with the Design Department, the Architect will select Consultants for kitchen, hardware, site servicing & irrigation systems, theatrical lighting & rigging, as well as Consultants for sound and costing as appropriate, and as necessary for the Project. The Architect shall coordinate the work of the Consultants.
- 32.1.3. The Design Department reserves the right to exercise its power of veto with respect to Consultants' selection.

### **32.2. SUB-CONSULTANTS' QUALIFICATIONS**

- 32.2.1. All engineering services shall be provided by Professional Engineers. (Refer to this Manual for minimum services to be provided by the Engineering Consultants as part of the Architect's basic services.)
- 32.2.2. Landscape services shall be provided by an Ontario Landscape Architect. (Refer to this Manual for minimum services to be provided by the Landscape Architect as part of the Prime Architect's basic services.)
- 32.2.3. Site Irrigation design and supervision should be provided by a Certified Irrigation Designer/Engineer registered with the Irrigation Association. (Refer to the Guideline for Field Irrigation System for Elementary and Secondary Schools.)
- 32.2.4. Theatrical design should be provided by a qualified ASTC Theatre Design Consultant. This Theatre Consultant is not to be connected in any way with any manufacturers or suppliers of theatrical equipment. (Refer to the Guideline for Performing Arts for Elementary and Secondary Schools.)
- 32.2.5. Hardware Specifications should be provided by a Hardware Consultant who is a current member of the American Society of Hardware Consultants. (Refer to the Guideline for Finish Hardware for Elementary and Secondary Schools.)
- 32.2.6. The Kitchen Consultant should be a member in good standing of its respective Association. (Refer to Standard Text Guideline for Kitchen and Served Equipment for Secondary Schools.)

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- 32.2.7. Whenever possible, other Sub-consultants such as sound, traffic and archeological should be members in good standing of their respective Associations.

### 33. MINIMUM SERVICES OF SUB-CONSULTANTS

#### 33.1. GENERAL

- 33.1.1. This section describes the Board's expectations with respect to the MINIMUM services to be provided by structural, mechanical, electrical and/or civil engineering consultants that are to be included in the basic services of the Architects. The Architects may have additional requirements that may need to be executed in the Architect/Consultant Agreement.
- 33.1.2. The minimum and/or expected services for all Mechanical, Electrical, and Structural Sub-consultants shall consist of, but not be limited to, the following:

#### 33.2. ELECTRICAL FIXTURE CUTS

- 33.2.1. As part of the Contract Document preparation, the electrical consultants must prepare a binder, with appropriate insertable tab dividers for all electrical fixtures proposed to be used on each project. Each fixture style must include a minimum of three (3) equal manufacturers that can provide an equal product for competitive bidding. A fixture schedule and a cost summary is to be included the binder.

#### 33.3. DESIGN DEVELOPMENT PHASE

- 33.3.1. Providing advice, consultation, and testimony to the Architect and the Board, leading to specialized conclusions and recommendations.
- 33.3.2. Carrying out of preliminary engineering studies including the collation and processing of information for the purpose of selecting several alternative plans or courses of action relative to the Project.
- 33.3.3. Exploring and gathering of topographical data and other site conditions sub-surface investigation; analyzing of conditions, or of several alternative plans; economic study of capital; operating costs and other financial considerations; and similar matters leading to conclusions of which recommendations for the Project will be made.
- 33.3.4. Preparing the submission of the M/E Brief, sketch plans, outlined specifications, preliminary estimates of the Project costs and schedules for the completion of work which will clearly indicate the concept of the Project.

**33.4. CONTRACT DOCUMENT PHASE**

- 33.4.1. Preparing final plans and specifications based on the approved preliminary plans and specifications, including the preparation of final designs and cost estimates; working drawings; specifications; and Contract Documents ready for tender and/or construction. Analyzing tenders and recommendations for the construction work.

**33.5. CONSTRUCTION PHASE**

- 33.5.1. Carrying out of general administration during the construction period following the award of the Contract; attendance at job meetings as required by the Construction Department; approval of certificates of Contractors' payment and general follow-up of construction with respect to progress; cost and schedules; review of shop drawings; consideration of alternative materials and construction methods proposed by the Contractor; preparation of change orders; obtaining of warranties and guarantees; and certification of Contract completion.
- 33.5.2. Supplying of Project staff to determine if the Contractor is carrying out his work in general accordance to the Contract Documents. These services shall be provided on the basis as outlined in *General Reviews* of the *Definitions* in the agreement between the Architect and Consultant(s) and shall include, but not be limited to the following:
  - 33.5.2.1. Reviewing of the work to determine that the work will generally satisfy the intent of the design and conforms substantially to plans and specifications.
  - 33.5.2.2. Specifying all necessary field-testing and equipment and monitoring reports of independent inspection agencies retained to carry out the inspection and testing.
  - 33.5.2.3. Following up on costs and schedules.
  - 33.5.2.4. Preparing Contractor's payment certificates.
  - 33.5.2.5. Supplying detailed final inspection, liaison and other assistance required to expedite the acceptance and takeover of the work by the Board or other agency contractually associated with the Board.
  - 33.5.2.6. Reviewing, and/or taking appropriate action with reasonable promptness, upon the Contractor's submittals such as shop drawings, product data etc. for conformance with the general design concept of the Work, as indicated by the Contract Documents.

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### **33.6. PRE- OCCUPANCY PHASE**

- 33.6.1. Review and comply with the Construction Department's requirements of the Consultants with respect to this phase of the work. Generally these include, but are not limited to the following:
- 33.6.1.1. Two weeks prior to the scheduled occupancy of any school facility, all the Architect's Sub-Consultants, jointly with the Architect, shall be required, by signed statement, to identify those building works, including deficiencies, which must be completed or corrected for reasons of Public Health and Safety before the building is occupied.
  - 33.6.1.2. As part of the basic services, the Architect and the Architect's Sub-consultants shall issue appropriate affidavits to the Authorities Having Jurisdiction that the Work was completed in "General Compliance" with the Contract Documents, regardless of the time and effort expended by the Architect and/or the Architect's Consultants in issuing same.
  - 33.6.1.3. The Architect and all the Architect's Consultants shall review marked up drawings prepared by the Contractor during the course of construction and accurately record all changes, additions or deletions that occur during construction as a result of the Work; which have been identified by the Contractor in accordance with the actual installation of the Work, Change Orders, etc., to the best of their collective knowledge, opinion and belief.

## **34. MINIMUM SERVICES OF LANDSCAPE ARCHITECT**

### **34.1. GENERAL**

- 34.1.1. This section describes the Board's expectations with respect to the MINIMUM expected services, terms of reference, and scope of work as listed below, and other additional services that are required by the Architect for the completion of the Project. The Architects may have additional requirements that may need to be included in the Architect/landscape Architect Agreement.
- 34.1.2. Although the Municipalities within the Region of Peel may have exempted the Board from having landscape drawings and specifications prepared by a Landscape Architect, the Board requires, that as part of the Architect's Basic Services, all Architects employ Landscape Architects to prepare landscape Contract Documents for all projects.
- 34.1.2.1. Exceptions to the above requirement may be made only with the approval of the Design Department.

- 34.1.3. The minimum and/or expected services for the Landscape Architect's services shall consist of, but not be limited to, the following categories:

**34.2. SCHEMATIC DESIGN PHASE**

- 34.2.1. This category of services shall consist of development of the design concept including the preparation of master plans; development plans; conceptual designs; planning approvals; site plan agreements; preliminary cost estimates; permit applications from all Authorities Having Jurisdiction; inclusion of landscape works within the Contract Documents; and consultant co-ordination.

**34.3. DESIGN DEVELOPMENT PHASE**

- 34.3.1. This category of services involves the assembly of relevant background material, analysis and synthesis, and preparation of conceptual plans for proposed work.
- 34.3.2. Conceptual planning studies shall include a range of work to determine the feasibility of a project including the obtaining and analyzing relevant planning, economic and environmental data; overall program development; development of alternative concepts; evaluation of concepts; preparation of estimates of capital and operating costs and other financial considerations.
- 34.3.3. Upon completion of the Design Development approved by the Board, the Landscape Architect shall prepare layout plans, grading plans indicating existing and proposed grades, planting plans, and construction details for phases of the Project which are to be undertaken as part of the Contract Documents. If required by the Board, or the Authorities Having Jurisdiction, irrigation plans may also need to be prepared by this Consultant.

**34.4. CONTRACT DOCUMENT PHASE**

- 34.4.1. This category of service shall include the preparation of Contract Documents based upon design content as determined and approved by the Architect and the Board and includes Working Drawings and Specifications for the Architect's and the Board's approval.
- 34.4.1.1. Unless the Landscape Architect is also a Certified Irrigation Designer, the field irrigation design should be designed by an independent Irrigation Designer and not the Landscape Architect. The fee for this work is part of the landscape architect's fee.
- 34.4.2. The Contract Documents prepared by the Landscape Architect shall consist of a grading plan establishing grades for all buildings, roads, retaining walls, outside steps, ramps and surface drainage structures and shall include subsurface

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drainage facilities and utility lines with their connections to existing utilities as required, AND,

- 34.4.3. A layout plan locating accurately by dimensions all buildings, walks, roads, parking areas, planting areas, and all other landscape site elements that form part of the design, AND,
- 34.4.4. A planting plan locating and identifying the plants to be used and any existing plants to be preserved or removed. The preparation of a plant list, included on the drawings, specifying the quantities, sizes and varieties of all plants on the planting plan.
- 34.4.5. Providing construction details, plans, sections and elevations of the individual elements of the site plan such as roads, walls, steps, gutters, catch basins, drains, paving patterns, fences, and irrigation systems.
- 34.4.6. Identifying all the types of materials to be used and set forth explicit and concise methods of construction and/or installation. Defining and organizing separate portions of the work that may logically be executed by other trades or by separate contracts. (In a unit price contract, the specifications shall define the units of measurement and units of payment.)
- 34.4.7. The tender information shall identify all drawings and documents pertaining to the work, and shall establish the manner in which tenders are to be submitted, the basis on which the work is to be contracted, the required units to be priced, terms, payments and all other information necessary to create a complete and valid Contract.

### 34.5. CONSTRUCTION PHASE

- 34.5.1. This category of service shall include, but not necessarily be limited to the carrying out of general administration during the construction period following the award of the Contract; attendance at job meetings as required by the Construction Department; approval of certificates of Contractors' payment and general follow-up of construction with respect to progress; cost and schedules.
- 34.5.2. Review of shop drawings; consideration of alternative materials and planting methods proposed by the Contractor; preparation of change orders; obtaining of warranties and guarantees; and certification of Contract completion.
- 34.5.3. The supply of Project staff to determine if the Contractor is carrying out the Work in general accordance with the Contract Documents.
- 34.5.4. Review of the work to determine that the work will generally satisfy the intent of the design and conforms substantially to plans and specifications.
- 34.5.5. Specifying all necessary field-testing and equipment and monitoring reports of independent inspection agencies retained to carry out the inspection and testing.

- 34.5.6. Following up on costs and schedules and preparing Contractor's payment certificates; supplying detailed final inspection, liaison and other assistance required to expedite the acceptance and takeover of the work by the Board or other agency contractually associated with the Board.
- 34.5.7. Reviewing, or taking appropriate action with reasonable promptness, upon the Contractor's submittals such as shop drawings, product data and samples, for conformance with the general design concept of the Work, as indicated by the Contract Documents.

END OF INFORMATION MANUAL FOR ARCHITECTS

DATE ISSUED	JULY 2000	REVISION 2	JULY 2006
COMPLETE REVISION	JANUARY 2006	REVISION 3	MAY 2008
REVISION 1	MARCH 2006	REVISION 4	DECEMBER 2008
REVISION 5	MARCH 2009		

LATEST REVISIONS ARE IN GREEN FONT



**Appendix 1**

Name of Project	Date of Tender					
Name of Recipients	Full Size Drawings <small>Complete Set</small>	¾ Size Drawings <small>Complete Set</small>	Full Size Drawings <small>Partial Set</small>	Specs Volume 1 <small>(A/S/G/L/K)</small>	Specs Volume 2 <small>(M &amp; E)</small>	Detail Book
<b>General Contractors as Applicable</b>						
1.						
2.						
3.						
4.						
5.						
6.						
<b>Mechanical Sub-Contractors</b>						
1.						
2.						
3.						
4.						
5.						
6.						
<b>Electrical Sub-Contractors</b>						
1.						
2.						
3.						
4.						
5.						
6.						
<b>Consultants – As applicable</b>						
1. Architect	1	1		2	2	2
2. Mechanical/Electrical Consultants	1	1M & 1E		2	2	2
3. Grading Consultant			1★			
4. Site Services Consultant			1★			
5. Specification Writer (if not in house)				1	1	
6. Kitchen Consultant			1★	1★	1★	1★
7. Sound Consultant			1★	1★		1★
8. Theatre Consultant			1★	1★	1★	1★
9. Other Consultant						
<b>Construction Associations</b>						
1. Toronto	1					
2. Hamilton	1					
3. Mississauga	1					
4. Durham	1					
5. Barrie						
Board	1	2◀		2	2	2
<b>TOTALS</b>						

**NOTES:**

**Maximum size of ¾ size drawings is to be 24" x 36" (610 x 915).**

◀ First and last page of drawings and UNBOUND set of specifications are to be LAMINATED

★ Selected drawings and specifications related to the specific discipline ONLY