


## Consultant Deliverable Procedure

<b>Category:</b> Finance Division	<b>Policy:</b> FIN-F18-026
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<b>Supersedes:</b>	<b>Coverage:</b> All Town Departments
<b>Reviewed by:</b> Manager of Procurement	<b>Approved by:</b> Director of Finance/Treasurer
<b>Authorized Signature:</b> 	

### Procedure Statement

The Town is committed to following open, fair and transparent Procurement processes and in doing so has created a procedure to ensure standardization of contract document packages, as they pertain to the acquisition of Goods, Services or Construction.

### Scope

This procedure applies to all Consultants retained by the Town to produce contract document packages for subsequent tendering processes.

### Purpose

The purpose of this procedure is to set out the guidelines for Consultants when creating contract document packages and applicable pricing tables for subsequent tendering processes.

### Definitions

All capitalized terms used in this procedure shall have the meaning given to them in the Procurement Policy, unless otherwise defined in this procedure.

## Roles and Responsibilities

### 1. Procurement Division

It is the role of the Procurement Division to:

1. provide the department with the applicable competitive bid template;
2. provide the department with the applicable pricing table CSV file for completion; and
3. assist departments in reviewing any additional document needs, as they pertain to the project.

### 2. Department

It is the role of the individual department to:

1. provide the Consultant with all applicable templates to create the ready for tender package.

### 3. Consultant

It is the role of the Consultant to:

1. read and comply with this procedure prior to commencement of document creation;
2. review the Town's competitive bid templates, including supplemental conditions and create special provisions that compliment or provide extension of terms, ensuring there is no contradiction between the standard template and the newly created special provisions;
3. provide a tender ready package that includes:
  - i. Special Provisions, written in Arial 11 point, single spaced, numbered SP 1.0, SP 2.0, SP 3.0 etc.;
  - ii. Drawings, in an unrestricted PDF file, if applicable;
  - iii. Applicable investigative reports, in an unrestricted PDF file, if applicable;
  - iv. Schedule of Items and Unit Prices, in a CSV file with no formatting or merging of cells  
Note: Each table within the Schedule of Items and Unit Prices requires its own CSV file. For clarity, if the Schedule of Items and Unit Prices has a Part A Mobilization, Part B Site Works and Part C Landscaping, then there should be three (3) separate CSV files.; and
  - v. Comply with the Town's 'Guide to Creating Accessible Microsoft Documents'.