

TERMS OF REFERENCE

for

[TYPE OF WORK] such as Grading, Granular Base Course, Asphalt Concrete Pavement and Other Work

HWY:C.S. PROJECT DESCRIPTION (PROJECT NUMBER)
(HWY:C.S.) CHAINAGE

HWY:C.S. PROJECT DESCRIPTION (PROJECT NUMBER)
(HWY:C.S.) CHAINAGE

Example for Road

590:02 & 04 W of Hwy 805 to Hwy 816 (PR03998A)
(590:02) km 22.270 to km 30.200
(590:04) km 0.000 to km 12.200

Example for Bridge

27:06 BF00310, Carrying Hwy 27 over Dogpound Creek,
West of Olds (PR06238A)

[ENGINEERING SERVICES] such as Preliminary Engineering, Detailed Design, Tender Preparation, Construction Supervision, Contract Administration and Post Construction

[BRANCH/REGION]

INTRODUCTION

This section should include the project description and type of work. This section should begin with:

“Alberta Infrastructure and Transportation would like to retain the services of a Consultant for...”

BACKGROUND

This section includes the history and background on the project (if there is any).

PROJECT SCOPE

This section provides the details of the project. Typical details include, project name, location, chainage, type of work (i.e. final stage paving), specifics (i.e. full width cold mill to 50mm with 50mm ACP), incidental work (i.e. sideslope repair, intersection improvement...), etc.

Any assumption such as quantities, number of construction days, production rates, percentage of construction supervision, etc. can be identified in this section. It should be noted that identifying assumptions such as quantities, etc. will aid the selection committee when comparing proposals. When identifying assumptions, a disclaimer, such as the following sentence, should be used;

“Note, all quantities and production rates are estimated for proposal purposes only and may differ during construction.”

ENGINEERING TASKS

This section identifies the specific tasks required of the Consultant. This can be detailed or general in manner.

Identify the type of engineering work required for this project (e.g. Preliminary Engineering, etc.)

Typically, the section will begin with the following statement;

“The Consultant will provide engineering services for the following phases; Preliminary Engineering, Detailed Design, Tender Preparation, Construction Supervision, Contract Administration and Post Construction. The Consultant will provide the required engineering services as outlined in the latest version of the “Engineering Consultant Guidelines for Highway and Bridge Projects, Volume 1 and 2.”

The required engineering tasks include, but are not limited to the following:”

INFORMATION AVAILABLE

Identify all information that can be picked up from the Project Sponsor or reviewed at the Regional office. It should be noted that if any information required for this project is with an external source, for example a Preliminary Engineering Report with another Consultant, it should be made available from the Regional office. The following format can be used;

“The following information can be picked up from the Project Sponsor in the Regional office:

-

Other information available for **review** at the Regional office includes:

-

The consultant is required to review all the information that has been compiled and satisfy him/her self with the findings. If for any reason, it is deemed necessary to revisit the surfacing strategy and basic structural design, the matter shall be referred to the Project Sponsor.”

OTHER INFORMATION

This is a standard section that reads as follows:

“Copies of the Department’s “Engineering Consultant Guidelines for Highway and Bridge Projects, Volume 1 and 2” and other relevant manuals are available for purchase at a nominal cost or on the website . All Consultants are reminded to reference this manual for the provision of engineering services.”

PROJECT SCHEDULE

This section should include Milestone dates the Project Sponsor wants identified in the Proposal. If applicable, submission date for Tender package or Report is required in all cases. As well, the completion date should also be included. The following example is typically used for this section;

“An Initialization meeting is to be scheduled by the Consultant at the AIT Regional Office. This meeting shall be held within ten days of advisement of being the successful Consultant. It is intended that most meetings will be held at the AIT Regional Office.

The Consultant will determine all other Milestone Dates in addition to the Milestone Dates listed below:

<u>Milestone</u>	<u>Date</u>
Conceptual Review Meeting	
Design review Meeting	
Submit Tender Package to Professional Services	
Construction Completion (for proposal purposes only)	
Contract Completion Date	

FEE SCHEDULE

This section should identify the payment options for each engineering task (i.e. lump sum, hourly, daily rate or unit price).

Typically, there should be separate fee schedules for each Contract. There should also be a further breakdown for roads and bridges. As well, a separate summary table, which summarizes all of the engineering fees, should also be provided. A summary table template will accompany the RFP. On rare occasions, the fee schedules can be separated into PR

identification numbers (i.e. three PR id numbers mean three separate fee schedule), however, most of the time this can be an onerous task for the Consultant to prepare and the selection committee to review. The following example is typically used for this section;

“A separate fee schedule for each Contract shall be provided. A further breakdown between road and bridge shall also be provided (if applicable). As well, an all-inclusive fee table shall be presented.

The following engineering phases will be paid as follows;

<u>Engineering Phase</u>	<u>Payment Type</u>
1. Preliminary Engineering	Lump Sum
2. Detailed Design	Lump Sum
3. Tender Package Preparation	Lump Sum
4. Construction Supervision and Contract Administration	Hourly plus disbursements
5. Post Construction	Lump Sum

PAYMENT SCHEDULE

This section explains the terms to which the Consultant will be paid (i.e. at the end of the task, as a percentage of work complete, etc.). Some examples of this are;

“Payment for services rendered shall be made as follows:

- **Phases 1 through 3** will be paid monthly on a percentage complete basis.
- **Phase 4** will be paid at the applicable hourly rate plus disbursements.
- **Phase 5** will be paid upon submission of the completed final details.

These payments shall be the full compensation received by the Consultant for performing all work and shall include all fees, disbursements, sub-consultants and other costs. These amounts may not be changed without the prior express written permission of the Minister. “

Or;

“The Consultant will be paid once a month on the actual hours of manpower and disbursements incurred. Post Construction will be paid as a lump sum upon completion of the Final Details. One invoice shall be submitted by the Consultant for payment of fees each month.”

Disbursements shall be in accordance with the department’s Schedule of Disbursements.

It is anticipated that the “percent expenses” concept can apply to most consulting services contracts that include an hourly rate pay method, where the consultant will incur these “misc. expenses”.

PROPOSAL EVALUATION CRITERIA

This section identifies the proposal criteria and number of pages required for the proposal. The section should read as follows (note that specific percentages should be use for each criteria;

*“The main body of this proposal shall be **no more than # PAGES (single side)**. **The Consultant shall use a 12 point font with 1 inch borders all around for the pages of the main body of the proposal.** Demerit points will be used for proposals not complying with either*

the page limit or the format requested. The letter of submittal, manpower allocation/fee schedule spreadsheets, project schedule chart, Organizational diagram, and resumes are not counted as pages. Appendices will not form part of the evaluation. For evaluation of the proposals, the following weights shall apply:

<u>Criteria</u>	<u>Percentage</u>
1. <i>Clarity and Presentation</i>	0 – 10%
2. <i>Project Comprehension</i>	10 – 30%
3. <i>Resource Budget</i>	15 – 25%
4. <i>Project Control</i>	5 – 10%
5. <i>Organization</i>	5 – 10%
6. <i>Innovation</i>	0 – 25%
7. <i>Project Team</i>	20 – 30%
8. <i>Past Performance</i>	30%
9. <i>Total</i>	100%

Any proposal considered by the selection committee to be unacceptable in any of the evaluation criteria may be rejected by the Department and will not be considered.”

CONTACT PERSONNEL

This section should only include personnel directly related to the project that can provide information that will assist the Consultants in preparing their proposal.

Project Sponsor

[NAME]
[POSITION]
[CITY], Alberta ☎ PHONE NUMBER

Project Administrator

Project Co-Sponsor