# A close-up of a logo Description automatically generated SCHEDULE B APPLICATION FOR A

**STANDING OFFER AGREEMENT**

**Request For Applications For Standing Offer Agreement Title:**

**Independent Commissioning Authority Services Request For Standing Offer No.: 1220-060-2025-003 APPLICANT**

**Legal Name of Applicant: Contact Person and Title**: **Business Address**: **Business Telephone: Business Fax: Business E-Mail Address: CITY OF SURREY**

City Representative: Sunny Kaila, Manager, Procurement Services E-mail for PDF Files: [purchasing@surrey.ca](mailto:purchasing@surrey.ca)

Dear Sir:

1. It is understood and agreed by the Applicant that should this Application be selected by the City, it will result in a Standing Offer only and the Services will be ordered by the City solely on an "as and when required" basis. The aggregate value of Services which may be ordered is conditional upon the needs of the City. No compensation will be accrued, owed or paid to any Applicant in the event that the Services are not ordered. If a Standing Offer is executed by the City, at the sole option of the City, the City may place an Order for Services specified in the Order and the Applicant agrees to provide those Services. The parties agree that the City may not place any Order for Services with the Applicant for the duration of the term of the Standing Offer. The parties agree that the City may purchase identical or similar Services from any other source.
2. If this offer is accepted by the City, such offer and acceptance will create a Standing Offer as described in:
3. the RFA-SOA
4. the scope of Services set out above and in Schedule A of the RFA-SOA;
5. the Standing Offer Agreement as Attachment 1 to this RFA-SOA;
6. this Application;
7. an Order (if any); and
8. other terms, if any, that are agreed to by the parties in writing.
9. Capitalized terms used and not defined in this Application will have the meanings given to them in the Standing Offer. Except as specifically modified by this Application, all terms, conditions, representations, warranties and covenants as set out in the Standing Offer will remain in full force and effect.

# APPLICANT’S EXPERIENCE, REPUTATION AND RESOURCES

* 1. Applicants should provide the following (use the spaces provided and/or attach additional pages, if necessary):
     1. Location of primary business, branch locations, background, stability, structure of the Applicant and number of years business has been operational;
     2. Applicant’s relevant experience and qualifications in delivering services similar to those required by this RFA-SOA;
     3. Applicant’s demonstrated ability to provide the Services;
     4. Applicant’s equipment resources, capability and capacity, as relevant;
     5. Applicant’s references (name and telephone number). Due to the nature of the proposed scope of Services, the Applicant’s experience should include examples of successful projects which required similar types of services as described in Schedule A – Scope of Services, producing superior quality within time and pricing constraints. The City's preference is to have a minimum of three references;
     6. Key Personnel. It is the City’s desire for the person(s) designated as the CxA to satisfy as many of the preferred capabilities as set out in Schedule A – Scope of Services as possible. Provide resumes of key personnel. The resumes shall include specific information about expertise in commissioning tasks, (e.g. design reviews, specification writing, commissioning management, troubleshooting, energy management, sustainable design, etc.).

For example:

* + - 1. Senior Project Lead;
      2. Commissioning Project Manager;
      3. Functional Testing Manager;
      4. Building Envelope Cx Specialist;
      5. Mechanical Cx Specialist;
      6. Electrical & Low Voltage Cx Specialist;
      7. Controls & Integration Cx Specialist; and
      8. Project Administration/Coordinator.

# APPLICANT’S TECHNICAL RESPONSE (SERVICES)

* 1. Applicants should provide the following (use the spaces provided and/or attach additional pages, if necessary):
     1. a narrative that illustrates an understanding of the City’s objectives, requirements and intent of the Services;
     2. a description of the general approach and methodology that the Proponent would take in performing the Services including specifications and requirements;
     3. describe your approach and methodology for project documentation control e.g., filing, tracking, project close out and submissions to the City;
     4. describe your processes and procedures for maintaining confidentiality and security of information;
     5. describe general capability and capacity to undertake the Services and your ability to meet the requirements of Schedule A of the RFA-SOA;
     6. briefly describe the collaborative process/method that would be used by the key personnel of the assigned commissioning services team in the various phases of a project;
     7. should include information on individual staff and Applicant’s experience with progressive design-build methodology with public sector projects; and
     8. should include information on individual staff and firm experience with construction management at Risk and other methodologies with public sector projects.

# APPLICANT’S FINANCIAL PROPOSAL

* 1. Indicate the Applicants proposed fee structure (excluding GST):
     1. Fee schedule of hourly rates should be as detailed as possible and tied to the descriptions of Schedule A – Scope of Services. The hourly rates should include all costs, direct and indirect costs associated with the performance of the Services:
        1. Senior Project Lead;
        2. Commissioning Project Manager;
        3. Functional Testing Manager;
        4. Building Envelope Cx Specialist;
        5. Mechanical Cx Specialist;
        6. Electrical & Low Voltage Cx Specialist;
        7. Controls & Integration Cx Specialist; and
        8. Project Administration/Coordinator.
     2. Disbursements - The proposed Standing Offer Agreement attached as Attachment 1 to this RFA-SOA provides that expenses are to be included within the hourly rates shown above, other than the expenses listed in the Agreement as disbursements. Details of disbursements are to be shown in the space below. Please indicate any expenses that would be payable in addition to the proposed hourly rates.

# PAYMENT TERMS

A cash discount of % will be allowed if invoices are paid within days, or the day of the month following, or net 30 days, on a best effort basis.

1. I/We have reviewed the General Terms and Conditions attached to this RFA-SOA as Attachment 1. If requested by the City, I/we would be prepared to enter into an agreement that incorporates the General Terms and Conditions, amended by the following departures (list, if any):

**Section Requested Departure / Alternative(s)**

1. The City requires that the successful Applicant have the following in place **before performing the Services**:
2. Workers’ Compensation Board coverage in good standing and further, if an “Owner Operator” is involved, personal operator protection (P.O.P.) will be provided, Workers' Compensation Registration Number ;
3. Prime Applicant qualified coordinator is Name: and Contact Number: ;
4. Insurance coverage for the amounts required in the Standing Offer Agreement as a minimum, naming the City as additional insured and generally in compliance with the City’s sample insurance certificate form (available on the City's web site at [www.surrey.ca](http://www.surrey.ca/) search [Applicants Certificate of Insurance](http://www.surrey.ca/files/Consultants_Form_Certificate_of_Insurance_(P).docx)
5. City of Surrey or Intermunicipal Business License Number:
6. If the Applicant’s Services are subject to GST, the Applicant's GST Number is

;

1. If the Applicant is a company, the company name indicated above is registered with the Registrar of Companies in the Province of British Columbia, Canada Incorporation Number .

As of the date of this Application, we advise that we have the ability to meet all of the above requirements **except as follows** (list, if any):

**Section Requested Departure(s) / Alternative(s)**

1. The Applicant acknowledges that the departures it has requested in Sections 8 and 9 of this Application will not form part of an Agreement unless and until the City agrees to them in writing by initialling or otherwise specifically consenting in writing to be bound by any of them.
2. I/We the undersigned duly authorized representatives of the Applicant, having received and carefully reviewed the Request including without limitation the General Terms and Conditions, submit this Application in response to the RFA-SOA.

**This Application** is offered by the Applicant this day of , 2025.

# APPLICANT

I/We have the authority to bind the Applicant.

|  |  |
| --- | --- |
| (Legal Name of Applicant)  (Signature of Authorized Signatory)  (Print Name and Position of Authorized Signatory) | (Signature of Authorized Signatory)  (Print Name and Position of Authorized Signatory) |