



Brock University

Facilities Management Operating Procedures

Subject: Standing Offer Agreement Consulting Services **Number:** FMOP 5-4

Approval: Executive Director **Issue Date:** __ Oct 09

Responsibility: Director, Campus Planning, Design & Construction Services

Review Period: 3 Years

STANDING OFFER AGREEMENT CONSULTING SERVICES

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1.0 Purpose of Procedure

- 1.1 The purpose of this document is to establish procedures for the creation of Standing Offer Agreements (SOA) for consultant or other specialty services, and the initiation of work under those agreements.
- 1.2 Standing Offer Agreements are advantageous in that they streamline the procurement of goods and services that are repetitively required, establish affiliations and understanding of needs over time, and allow for either party to the SOA to continue or exit the agreement or to renew or not renew the SOA.

2.0 Standing Offer Agreement

- 2.1 **Request for Proposals.** A Request for Proposal (RFP) process should be followed in order to source and receive proposals from interested consultants. The RFP should include information on the following items:
 - 2.1.1 Consultant services required
 - 2.1.2 Consultant qualifications/experience required
 - 2.1.3 Term of services
 - 2.1.4 Projected volume of work
 - 2.1.5 Administrative and general conditions
 - 2.1.6 Evaluation method and selection procedure
 - 2.1.7 Proposal submission requirements



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- 2.2 **Selection.** A selection committee comprised of relevant stake-holders shall review, score and rank the proposals. If necessary, interviews with the short-listed proponents may be undertaken prior to selection.
 - 2.3 **Approval of SOA.** Prior to engaging the Consultant, the SOA shall be approved by the appropriate individual(s) and/or Board of Trustees in accordance with the following University policies:
 - 2.3.1 4.01 – Signing Authority Policy
 - 2.3.2 4.02 - Purchasing Policy
 - 2.3.3 4.04 - Quotation, Tender, & Award Policy
 - 2.4 The SOA is to be formalized by the signing of a contract where there is a relevant contract template available, or a letter of agreement signed jointly by the University and the Consultant.
- 3.0 **Initiating Consultant Work**
- 3.1 **Consultant Services Request Form.** Prior to engaging the Consultant for the provision of services for an individual project, the Project Manager is to complete a “Consultant Services Request” form. The intent of the form is to describe the scope of work to the Consultant, establish a schedule for their work and a basis for determining the fee.

The form requires information on the following items:

 - 3.1.1 Project Information: the project number, account number and work request number must be indicated.
 - 3.1.2 Type of Project: indicate the project type.
 - 3.1.3 Location of Project: indicate the project location.
 - 3.1.4 Consultant Services Required: indicate the specific services required, whether a cost estimate is required at the end of the phase, and the required completion dates for the relevant phases (if known). If an investigative study or consultative services are required, indicate that and provide a brief description.
 - 3.1.5 Consultant Fee Basis: indicate whether the fee is to be a fixed fee, a per diem fee with upset limit, a per diem fee with no upset limit or describe another method for determining the fee. The Project Manager and the Consultant must agree how the fee is to be determined prior to beginning work on the project.
 - 3.1.6 Additional Information: this area is to be used for providing additional project information to the Consultant so that they understand the scope of work and any special issues or requirements.
 - 3.1.7 Consultant Agreement: the Project Manager and the Consultant are to agree to the schedule of the Consultant’s work and the fee (or fee basis) prior to commencing work on the project. The form



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is to be signed and dated by the Project Manager and the Consultant.

3.2 **Distribution of Form.**

- 3.2.1 The form is to be sent directly to the Consultant by the Project Manager
- 3.2.2 The consultant is to return a signed copy to the Project Manager
- 3.2.3 The Project Manager is to provide a copy to the Project Planning Assistant, Campus Planning Design and Construction.

4.0 **Consultant Invoicing**

- 4.1 **Monthly Invoice.** The consultant is to issue a monthly consolidated invoice for all projects being undertaken under the SOA. The invoice should include a "Monthly Project Summary" spreadsheet listing the project name and number, the work request number the Project Manager, the fee basis (fixed or per diem), the base fee, the invoiced fee amount, expenses, the amount due for each project and the total amount due for all projects combined.
- 4.2 **Invoiced Amount Approvals.** The Consultant's monthly invoice will be submitted to the Project Planning Assistant, Campus Planning Design and Construction who will review the invoice and circulate it to the Project Managers whose projects have fees owing for the billing period. The Project Managers will initial their projects signifying approval of the amount(s) due. The Project Planning Assistant will send the approved invoice to the Facilities Management Administrative Assistant, who will process the invoice for payment.
- 4.3 **Payment and Cost Tracking.** Consultant payments will be applied to the appropriate project work request and account number so that the costs are included on the Project Cost Control Spreadsheet.

5.0 **References**

- 5.1 Brock University policies:
 - 5.1.1 4.01 – Signing Authority Policy
 - 5.1.2 4.02 - Purchasing Policy
 - 5.1.3 4.04 - Quotation, Tender, & Award Policy

6.0 **Not Allocated**

Annexes

Annex A Monthly Project Summary

Annex B Request for Consultant Services