

CONTRACTS by TECHNOLOGISTS

Create effective Technical Contracts

WORKSHOP OUTLINE

Section 1 Introduction & Logistics

1. ASET Offices
2. Introductions & Process
3. Schedule
4. Outline Review
5. What are your expectations in this workshop?

Section 2 Contract basics

1. Contract fundamentals - What is a contract?
2. The requirement (or objectives) for technical clarity in a contract
3. Doesn't a lawyer write a contract?
4. Owner or contractor?
5. Skills to develop contracts in your company
6. Table matrix to compare complexity, risk, value, source, professional skills
7. Non-disclosure agreements and teamwork

Section 3 Planning a Contract

1. Essential Elements
2. Standard and pro forma documents
3. Contract Strategy
4. Project risks
5. Project variables
6. Define responsibilities
7. Supply of materials
8. Scope of Work (SOW)
9. System performance and monitoring
10. Schedule
11. Drawings and supporting documentation
12. Pricing options
13. Payment

Section 4 Contract Formation

1. How to write a Scope of Work
2. Create the Schedule of Payment
3. Incorporate detail from planning phase into contract
4. Pre-mobilization requirements
5. Site access and facilities
6. Key installation methods
7. Warranty

8. Review standard clauses if using Pro-forma or COAA type documents
9. Clarify and purge
10. Participants and signatures

Section 5. Contract Administration

1. Assign Contract Administrator
2. Dispute Resolution
3. Work progress reporting and meetings
4. Substantial Completion
5. Continuous improvement

Section 6 Evaluating Tender Packages and submitting a Bid

1. Bidding process considered Contract A
2. Compliant Bid only
3. Review Package
4. Submitting Bids
5. Canadian Contract Law

Section 7 References