

DEVELOPING A REQUEST FOR INTERIOR DESIGN SERVICES



CORPORATE/OFFICE PROJECTS



Association
of Registered
Interior Designers
of Ontario

MAKE SPACE FOR GOOD DESIGN.

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TABLE OF CONTENTS

The Purpose of This Booklet	3
Focus on Quality	3
About Interior Design	4
Types of Projects	5
What Interior Designers Do	6
The Project Team	7
Hiring an Interior Designer	8
An Explanation of Worksheets and Templates	12
Project Overview	13
Scope of Services - Interior Design	18
Scope of Services - Project Management	25
Glossary of Terms	29

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All photographs in this booklet illustrate projects completed by ARIDO members

THE PURPOSE OF THIS BOOKLET

This booklet and the online tools that support it comprise a thorough and efficient method to develop a Request for Proposal (RFP) or a Request for Quotation (RFQ), the best foundation for the success of any commercial or institutional interior design project. An RFP/RFQ is a document that describes the project, summarizes the project's requirements, lists the services needed and outlines the format for Interior Designers to respond with information on their firms and costs for their services. For projects where the interior design firm has already been selected, this booklet can serve as a checklist or review of requirements, responsibilities and procedures.

FOCUS ON QUALITY

A key ingredient for a successful project is to focus on quality in the selection process. Quality-based selection involves comparing candidates based on such criteria as:

- Experience in successfully providing similar services
- Overall history and reputation
- Management experience and skills
- Familiarity with relevant local aspects - geography, culture, facilities and professional consultants
- Project methodology
- Technical competence
- Unique value-added qualities such as creativity and innovation
- Commitment to the client's interests
- Quality of references

ABOUT INTERIOR DESIGN

When renovating, relocating, evaluating or establishing a new facility, working with an Interior Designer is one of the best investments a client or owner can make.

Interior Designers can help realize clients' goals and make the interior environment effective, attractive and profitable. They also ensure that the design complies with all regulatory and legal requirements and that the life, health, safety and welfare of the occupants are protected.

Interior Designers have unique training in designing interior environments. They are skilled and experienced at providing a full scope of services to complete the project on time and on budget. With fees making up a very small portion of the overall real estate/construction costs, hiring a qualified Interior Designer is a wise investment in the successful outcome of the project. An Interior Designer adds value to the undertaking, minimizes risk and keeps project costs down.

The Association of Registered Interior Designers of Ontario (ARIDO) is the professional association representing Interior Designers in Ontario. Only qualified members of ARIDO are entitled to use the designation ARIDO or the title Interior Designer. ARIDO ensures that Interior Designers are highly trained through a rigorous process of education, experience and examination. All Interior Designers are required to:

- Comply with the Ontario government's qualification and registration requirements under the Building Code.
- Carry liability insurance.
- Participate in ongoing regular professional development.
- Uphold a professional code of ethics and standards of practice.

Many Interior Designers in Ontario are also qualified to offer services nationally and internationally.

TYPES OF PROJECTS

Typical projects that fall under the scope of services of an Interior Designer include:

- Corporate, professional and business offices.
- Healthcare facilities including hospitals, long-term care facilities, retirement homes, medical and dental facilities and spas.
- Hospitality spaces including restaurants, bars, nightclubs, hotels, inns and clubhouses.
- Retail spaces selling products or services including stores, retail banking, food courts, shopping centres, entertainment venues, showrooms, exhibit designs and marketing centres.
- Residential spaces including homes, condos, cottages, chalets and yachts.
- Public and institutional spaces including museums, galleries, libraries, universities and schools.



WHAT INTERIOR DESIGNERS DO

While each project is different and the scope of services to be provided varies, an Interior Designer will generally perform the following services on any interior design project:



- 6
- Manage the interior design process, including strategic planning, project planning, budgeting and schedules.
 - Analyze the client's needs and goals.
 - Integrate findings with knowledge of interior design, sector and economic trends, legal and regulatory requirements.
 - Formulate preliminary design concepts that are functional, fiscally appropriate and aesthetically pleasing.
 - Develop and present final design recommendations.
 - Prepare working drawings and specifications for interior construction, space planning, materials, finishes, furnishings, fixtures and equipment.
 - Collaborate with other practitioners who offer professional services in the technical areas of mechanical, electrical and structural design as required for regulatory approvals (building permits).

- Prepare contract documents and administer bids as the client's agent.
- Review and evaluate construction during implementation and coordinate completion of project with consultant team.

As well, on some projects an Interior Designer may:

- Act as Project Manager on behalf of the client to manage the project teams through all phases of the project.
- Develop and implement a branding and communications strategy in relation to the project.
- Undertake feasibility studies on potential facilities and coordinate with real estate professionals.

THE PROJECT TEAM

While Interior Designers work on a specific scope of services, they may act as the Prime Consultant and Project Manager for the client and are trained and experienced at retaining and working with a number of other consultants or suppliers who may be required to complete the project. The list of specialists an Interior Designer may retain, or assist the client to retain, includes:

- 7
- Acoustical consultants
 - Architects
 - Art consultants
 - Audio visual/technology solutions consultants
 - Building code consultants
 - Communications, branding and graphics consultants
 - Contractors and/or construction managers
 - Cost consultants
 - Filing and record systems suppliers; storage and display systems suppliers
 - Furniture and fixtures suppliers
 - Lighting consultants
 - Market analysts
 - Mechanical, Electrical, communications and/or Structural Engineers
 - Merchandising and visual display consultants
 - Real estate consultants
 - Relocation consultants and moving companies
 - Security consultants
 - Signage and/or wayfinding consultants

Be sure to consider the project in terms of other consultants whose expertise will be required and the timing and budget implications that need to be incorporated.



8

HIRING AN INTERIOR DESIGNER

Hiring an Interior Designer usually involves a number of key steps:

1. Develop a design brief or a Request for Proposal (RFP) that identifies the project needs, lists the scope of services required and outlines the format for the proponents' response. (The worksheets and templates in this booklet and online are invaluable for this.)
2. Establish a list of potential Interior Designers with relevant experience.
3. Issue the Request for Proposal (RFP) or design brief.
4. Interview Interior Designers whose expertise fits the project needs. (This can be done before or after the submission of formal proposals.)
5. Check qualifications and references.
6. Select an Interior Designer.
7. Finalize consulting agreements in writing.



9

CONGRATULATIONS ON MAKING SPACE FOR GOOD DESIGN.

Please be sure to contact ARIDO for any assistance and advice including a list of qualified Interior Designers in your area.



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10



11



Visit www.arido.ca to view winners of ARIDO's annual Awards of Excellence and to link to web sites of firms directed by Interior Designer members with ARIDO.



DEVELOPING A REQUEST FOR INTERIOR DESIGN SERVICES

WORKSHEETS & TEMPLATES

12

1. Project Overview
2. Scope of Services – Interior Design
3. Scope of Services – Project Management
4. Glossary of Terms

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CORPORATE/OFFICE PROJECTS

INSTRUCTIONS

The worksheets and templates are provided here in printed form to serve as the client's rough working copy and to give direction on what should be included in the Project Overview. Visit www.arido.ca to download interactive templates for composing a Request for Proposal/Request for Quotation.

I. PROJECT OVERVIEW

I. GENERAL INFORMATION

Name of organization: _____

Name of contact: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____

2. BACKGROUND

Describe the organization, its relevant history and factors that led to this project:

Nature of the organization: _____

Reasons for this project: _____

13

3. PROJECT OBJECTIVES AND INFORMATION

Provide a brief overview of this project and the specific end results the organization hopes to achieve.

Project overview: _____

Project objectives: _____

Project location including street address: _____

Project start date: _____

Desired completion date: _____

Project size (approximate sq. ft.): _____

Number of staff to be accommodated: _____

4. SPECIFIC NEEDS

The following information will give the Interior Designer a better sense of the nature of the project.

a. Type of project

- Renovation Expansion Relocation New Construction

b. Specialized spaces/areas required (check all that apply):

In order to respond effectively, it is helpful to know if, in addition to the typical workplace requirements, any of the following specialized spaces are anticipated in the project:

Specialized Spaces/Areas	Spaces Needed? ✓
Conference centres	
Copy/Reproduction centre	
Data centre	
Cafeteria	
Fitness facility	
Childcare facility	
Broadcast studio	
Labs	
Other (please identify):	

c. Other relevant information

Outline and/or provide any other relevant information that may influence the proposed project including relevant corporate policies, standards (e.g. workplace standards) and other business needs and issues:

d. Scope of services

Please review and confirm the attached Scope of Services – Interior Design and Scope of Services – Project Management.

The Interior Design Services Schedule defines the set of mandatory, base and optional services an Interior Designer can perform on a Corporate/Office project.

If the Interior Designer is to act as the Project Manager, complete the Project Management Services Schedule as well.

Describe any optional services needed:

The Interior Design Services Schedule will form part of the consulting agreement. If applicable, the Project Management Services Schedule would also form part of the consulting agreement.

5. BUDGET AND OTHER REQUIREMENTS

Estimated Project Budget (if known). Please indicate what is covered by the project budget (e.g. construction, furniture, equipment, IT, security, consultants' fees, taxes etc.):

\$ _____

Construction budget or an estimated construction budget range (if available):

\$ _____

All ARIDO members are required to carry professional liability insurance. If specific project insurance is required, including minimum insurance liability requirements, co-insurance requirements or a requirement that certificates of insurance be provided, please specify:

Other requirements:

6. INFORMATION AVAILABLE TO THE DESIGNER

Indicate whether existing plans (as-built drawings, architectural drawings and engineering drawings) are available, and whether they are in hard copy or electronic form:

7. PROPOSAL EVALUATION CRITERIA

Please list the criteria to be used to assess the Interior Designer's proposal and the weight placed on each criterion. This document is not a formal tender and the rules governing tenders will not apply, thus the lowest cost will not necessarily be a criterion for an evaluation.

A potential tool that could be used in evaluating submissions is shown below:

Potential Criteria	Weighting %
Creativity and Innovation	
Experience and Qualifications of the Project Team	
• Experience of the team	
• Experience on similar projects	
• Availability of key staff	
• Stability and reputation of the firm	
• Multi-disciplinary/specialty services	
Project Implementation	
• Approach and methodology	
• Ability to meet project deadlines	
Price	
Value-Added Services	
	100%

8. PROPOSAL PROCESS

Number of copies of the proposal required (electronic or hard copy):

Final date, time and location for submissions:

Reference information required:

Information about required selection interviews:

Information about selection process:

9. OTHER RELEVANT INFORMATION



2. SCOPE OF SERVICES – INTERIOR DESIGN

The Interior Design Services Schedule indicates whether a service is a **Base** or an **Optional** Service.

✓ **Base Services:** ARIDO considers these services to be basic service and/or best practice on any project. Unless otherwise removed by the client from the schedule, they will be performed by the Interior Designer and included in the professional fee. Some base services are legislative or regulatory requirements and are therefore deemed mandatory.

18 ✓ **Optional Services:** These services may or may not be part of the scope of services. Clients should identify whether they require these additional services. [These services will be costed separately in the professional fee.]

Please review the Scope of Services and do the following:

1. Review the services indicated as **Base Services**. If for some reason a base service is not required, please cross out the checkmark in the column entitled Base Services. Items checked with an asterisk (✓*) are mandatory and may not be crossed off.

2. Circle any **Optional Services** needed, cross off those that don't apply and provide details in the Project Overview if appropriate.

INSTRUCTIONS

The online templates for Interior Design Services Schedule and Project Management Services Schedule are available at www.arido.ca.

With the exception of mandatory services, the RFP can be shaped by clicking buttons on or off. Because changes in wording are not possible on these two schedules, include all necessary specifics in the Project Overview.

Interior Design Services	Base Services ✓	Optional Services ✓
A. PROJECT START-UP		
1. Attend initial project meeting to understand: <ul style="list-style-type: none"> • Roles and responsibilities of consultant team members • Reporting structures • Project meeting schedule 	✓	
2. Review current facilities: obtain existing electronic plans from client, tour site, review basic building services and systems	✓	
3. Review proposed facilities: obtain electronic base building plans from landlord (if applicable), tour site, review basic building services and systems	✓	
4. Evaluate feasibility of alternative sites/facilities		✓
5. Verify accuracy of base building plans through site verification/measurement	✓	
6. Produce an as-built drawing of proposed facility conditions if not available		✓
7. Manage application process for LEED certification throughout project		✓
Deliverable: Verified Base Building Plan	✓	
B. NEEDS ANALYSIS AND PROGRAMMING		
1. Conduct kick-off discussion with project team to understand: <ul style="list-style-type: none"> • Project goals, objectives, requirements • Proposed project budget • Proposed project schedule 	✓	
2. Understand client needs/requirements by gathering information and/or conducting interviews: <ul style="list-style-type: none"> • Current and projected staffing requirements • Departmental functions, relationships and adjacencies • Facility requirements, such as workplace, common areas, amenities and special area facilities • Special equipment requirements • Existing office and furniture standards, individual workspace allocation policies 	✓	
3. Develop new workplace space standards for offices and workstations		✓

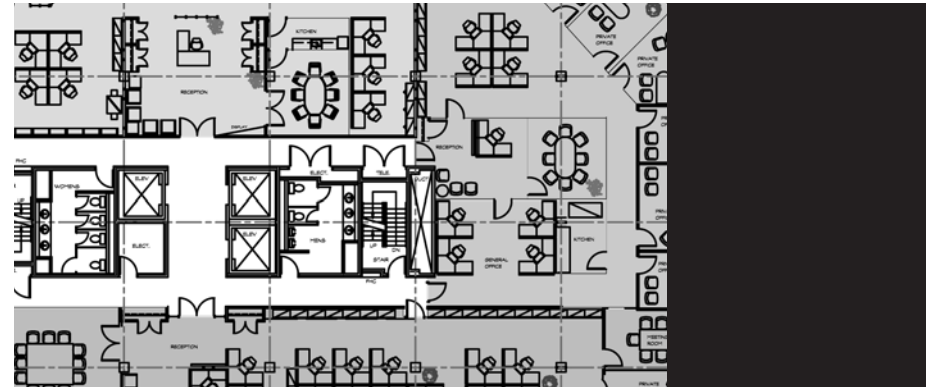
Interior Design Services	Base Services	Optional Services
	✓	✓
4. Develop and determine area requirements	✓	
5. Prepare a program of space needs for client approval	✓	
Deliverable: Approved Program of Space Needs	✓	
C. SCHEMATIC DESIGN		
1. Coordinate with mechanical, electrical and communication consultants to determine location/adjacency requirements	✓	
2. Coordinate with other specialists if required		✓
3. Prepare stacking plan (if multi-floor site)	✓	
4. Prepare blocking plan identifying group sizes, locations, and adjacencies	✓	
5. Conduct code compliance review of schematic plan to ensure compliance with authorities having jurisdiction	✓ *	
6. Prepare cost estimate scenarios to evaluate alternative schematic design approaches		✓
7. Develop phasing strategies related to moves		✓
8. Prepare one schematic design for client approval	✓	
9. Prepare a cost estimate for client approval	✓	
Deliverables: A Schematic Design and a Cost Estimate		
D. DESIGN DEVELOPMENT		
1. Prepare detailed space plan(s) to reflect approved program and schematic plan. Plans to indicate all built elements and generic furniture/equipment.	✓	
2. Develop conceptual design through sketches, elevations, and details	✓	
3. Suggest materials and generic furniture elements to communicate design concept	✓	
4. Prepare preliminary partition plans, reflected ceiling plans and power/communications plans	✓	
5. Conduct code compliance review of design development to ensure compliance with authorities having jurisdiction	✓ *	

Interior Design Services	Base Services	Optional Services
	✓	✓
6. Coordinate with project/engineering consultants and client to finalize requirements	✓	
7. Liaise with the Project Manager to confirm that design concept elements conform to approved budget	✓	
8. Models		✓
9. Renderings		✓
10. CAD modelling		✓
11. Presentation boards		✓
12. Communications/branding/graphics applications		✓
13. Customized solutions (e.g. custom carpet or light fixtures). Please describe:		✓
14. Prepare one design development package for client approval	✓	
Deliverable: Design Development Package	✓	
E1. FURNITURE/EQUIPMENT		
1. Review existing furniture items to be considered for re-use. Recommend use of existing or new items as appropriate.		✓
2. Develop inventories of existing equipment identified for relocation (including size, model and connectivity requirements)		✓
3. Ensure engineering consultants received detailed equipment requirements from client (e.g. printers, copiers). Locate equipment on plan.	✓	
4. Research furniture options for client consideration		✓
5. Propose new furniture items. Prepare preliminary budget for new furniture items for approval	✓	
6. Prepare generic furniture plans based on approved standards		✓
7. Review detailed furniture plans for compliance to design intent and compliance with current authorities having jurisdiction	✓ *	
8. Integrate special equipment in furniture plans	✓	
E2. FURNITURE STANDARDS		
1. Develop generic furniture standard footprints into detailed specifications for pricing		✓

Interior Design Services	Base Services	Optional Services
	✓	✓
2. Coordinate site tours with bidders for furniture supply		✓
3. Coordinate request for responses to bidders (identifying detailed specifications, finishes, and quantity anticipated for initial purchase and for ongoing buying agreements)		✓
4. Provide analysis and recommendations regarding submissions		✓
5. Revise generic standards to reflect successful bidder's specifications		✓
6. Revise generic furniture plans to reflect sizing of successful manufacturers		✓
7. Provide dimensions to installation supplier for provision of installation drawings		✓
8. Provide staff numbers/names plans for location plans		✓
E3. CUSTOM FURNITURE DESIGN		
1. Design custom furniture solutions		✓
2. Prepare custom furniture budget		✓
3. Tender custom furniture solutions		✓
4. Make recommendations regarding submissions		✓
5. Reserve exclusive client rights with manufacturer		✓
E4. FURNITURE PROCUREMENT		
1. Prepare furniture specifications outlining performance criteria for tender		✓
2. Coordinate tenders with manufacturers/dealers on behalf of client		✓
3. Evaluate submissions and make recommendations		✓
4. Coordinate final detailed specifications with successful bidder(s)		✓
5. Review final quotation on behalf of client		✓
6. Coordinate furniture delivery and installation; providing supervision where required		✓
7. Review completed installation and identify deficiencies		✓
8. Conduct final inspection		✓

Interior Design Services	Base Services	Optional Services
	✓	✓
F. CONTRACT DOCUMENTATION		
1. Coordinate with consultants to transfer mechanical, electrical and communication information relating to engineering requirements	✓	
2. Prepare contract document package including: (but not limited to) <ul style="list-style-type: none"> • Key plan or site plan • Demolition plan • Partition plan • Reflected ceiling plan • Power/communications/electrical plan • Construction details (sections, elevations, finishes and specifications) • Floor finishes plan or schedule • Wall finishes plan or schedule • Door and hardware schedules • Furniture plan • General notes and specifications 	✓	
3. Review interior design contract documents for compliance with current authorities having jurisdiction	✓ *	
4. Prepare contract document package for client approval	✓	
5. Prepare building permit application forms with BCIN number	✓ *	
Deliverables: Contract Document Package, Completed Building Permit Application Forms with BCIN number	✓	
G. CONSTRUCTION TENDER		
1. Issue contract document package for tender	✓	
2. Provide clarification of issued contract documents to bidders in the form of addenda	✓	
3. Participate in the bid review process providing recommendation for award of contract(s) to general contractor(s) or trades	✓	
4. Update contract documents if needed to reflect contractual changes resulting from tender process	✓	
Deliverable: Final Contract Document Package	✓	
H. CONSTRUCTION CONTRACT ADMINISTRATION		
1. Conduct mandatory inspections as required by authorities having jurisdiction	✓ *	

Interior Design Services	Base Services	Optional Services
	✓	✓
2. Attend one weekly site meeting and inspection for construction period as defined in project schedule	✓	
3. Conduct additional site inspections as requested by the client		✓
4. Prepare contract administration documents (e.g. change orders, notices) to reflect the intent of approved contract documents and changes to same	✓	
5. Review submittals (samples and shop drawings) for compliance to contract documents	✓	
6. Review monthly draws and forward to Project Manager for Certificate for Payment	✓	
7. Upon receipt of Certificate of Substantial Performance, prepare a list of deficiencies related to interior design	✓	
Deliverables: Mandatory Inspections and List of Interior Design Deficiencies	✓	
I. PROJECT COMPLETION		
1. Conduct final site inspection no later than three weeks after initial date of substantial completion	✓ *	
2. Provide client with a complete record set of interior design as-built drawings in electronic PDF format	✓	
Deliverable: Interior Design As-Built Drawings in PDF format	✓	



3. SCOPE OF SERVICES – PROJECT MANAGEMENT

The previous schedule defines the set of mandatory, base and optional interior design services an Interior Designer can perform on a project.

If the Interior Designer is to act as the Project Manager, use this schedule also. The services a Project Manager usually performs are checked off in the right-hand column. If for some reason the Project Manager will not be required to perform these services, cross them out.

Project Management Services	Base Services
A. PROJECT START-UP (& GENERAL SERVICES)	
1. Define roles and responsibilities, required information flow and approvals process	✓
2. Act as the client's project representative according to the client's reporting structure and responsibilities	✓
3. Establish the type of construction contract (stipulated bid or construction management)	✓
4. Prepare overall project cost estimate	✓
5. Prepare overall project schedule	✓
6. Review tenant/landlord agreements in effect	✓
7. Recommend and coordinate all consultants. Prepare RFPs for consultants. Review and determine selection of all consultants with the client.	✓

Project Management Services	Base Services
8. Receive consultant invoices throughout project for review and approval, and monitor timely payment	✓
9. Chair project-related meetings	✓
10. Issue minutes and progress reports	✓
B. NEEDS ANALYSIS & PROGRAMMING	
1. Attend meetings with consultants	✓
2. Identify key issues requiring lead times and approvals prior to construction	✓
3. Conduct formal preliminary design review of programming documents prior to commencement of schematic design	✓
4. Update cost estimate based on all known information	✓
5. Update schedule based on all known information	✓
6. Ensure timely approvals prior to commencement of next phase	✓
C. SCHEMATIC DESIGN	
1. Attend meetings with consultants	✓
2. Conduct review of schematic design documents	✓
3. Update cost estimate based on all known information	✓
4. Update schedule based on all known information	✓
5. Ensure timely approvals prior to commencement of next phase	✓
D. DESIGN DEVELOPMENT	
1. Coordinate the issuance of design development (preliminary) documents to Mechanical/Electrical Engineers and other consultants to permit commencement of their work	✓
2. Request cost estimates from all consultants based on layout and design concepts	✓
3. Attend meetings with consultants	✓
4. Conduct review of design development package	✓
5. Update cost estimate based on all known information	✓
6. Update schedule based on all known information	✓
7. Ensure timely approvals prior to commencement of next phase	✓

Project Management Services	Base Services
E. FURNITURE/EQUIPMENT	
1. Attend meetings with consultants	✓
2. Conduct review of furniture/equipment plans	✓
3. Update cost estimate based on all known information	✓
4. Update schedule based on all known information	✓
5. Ensure timely approvals	✓
6. Confirm schedule for ordering, delivery and installation	✓
7. Liaise with building management and contractors to accommodate furniture and equipment delivery and installation	✓
8. Ensure that consultants carry out all inspections of furniture and equipment and that deficiencies are rectified	✓
F. CONTRACT DOCUMENTATION	
1. Review construction documents as prepared by all consultants	✓
2. Obtain client signature on all construction documents for the project	✓
3. Issue construction drawings to the landlord for approval	✓
4. Receive permit application documents prepared by all consultants	✓
5. Apply for permits	✓
6. Update cost estimate based on all known information	✓
7. Update schedule based on all known information	✓
8. Ensure timely approvals prior to commencement of next phase	✓
G. CONSTRUCTION TENDER	
1. Prepare a list of contractors and review their qualifications with client	✓
2. Issue requests for tender and tender packages to contractor	✓
3. Conduct site walk-through with all bidders	✓
4. Obtain addenda/clarifications from all consultants	✓
5. Follow-up with written responses to inquiries from bidders	✓
6. Receive and analyze bids and make recommendations to the client	✓
7. Award contracts in a timely fashion to meet project schedule	✓

Project Management Services	Base Services
8. Hold coordination meeting with successful contractor(s) to discuss schedule and agreed management procedures and responsibilities	✓
H. CONSTRUCTION CONTRACT ADMINISTRATION	
1. Prepare final schedule for project execution	✓
2. Conduct facility turnover inspection with contractor and landlord	✓
3. Conduct regular site reviews and meetings regarding progress to ensure work is in accordance with construction documents	✓
4. Monitor schedule to ensure progress and fulfilment of contractor agreements	✓
5. Review and approve Request for Payments, submit to client and monitor payment	✓
6. Obtain progress draw requests from consultants, prepare Certificate for Payment, submit to client and monitor payments	✓
7. Receive Contemplated Change Orders from all consultants and issue to contractors	✓
8. Review and obtain client approval on Change Orders Issue Change Orders	✓
9. Receive deficiency reports from all consultants and issue to the client and contractors	
10. Inspect space upon completion and prior to installation of furniture and prior to movers' activities ensuring readiness for installation of furniture	✓
11. Ensure that all inspections required by jurisdictions having authority have taken place and deficiencies are rectified prior to turnover to client	✓
I. PROJECT COMPLETION	
1. Ensure proper publication of Certificates of Substantial Performance	✓
2. Work with contractor(s) to ensure timely completion of deficiencies	✓
3. Obtain occupancy permits where applicable	✓
4. Review final invoices, approve and pass onto the client for payment	✓
5. Receive all warranties and maintenance manuals from contractors; review with client to establish ongoing maintenance procedures	✓
6. Receive all as-built documents from contractor(s) and file with landlord, client and maintenance contacts as appropriate	✓

4. GLOSSARY OF TERMS

The following terms are often used in the description of Interior Design Services. These terms are provided for general guidance and are not to be taken as definitive definitions of the terms set out.

“**ARIDO**” means the Association of Registered Interior Designers of Ontario

“**BCIN**” means “Building Code Identification Number.” The Ontario government requires that anyone submitting designs of any type to municipalities in connection with a building permit must be registered and obtain a designer registration number from the Ministry of Municipal Affairs and Housing. This Building Code Identification Number, or BCIN #, is issued to firms and individuals after specific conditions are met including the successful completion of the appropriate Ministry of Municipal Affairs and Housing examinations based on the Ontario Building Code.

“**Blocking Plan**” illustrates the location of blocks of space including adjacencies and relative sizes of spaces within a floor plate. Sometimes referred to as a bubble diagram.

“**Branding**” refers to the identification and communication through a variety of methods of an organization's essence, identity, image, personality and/or promise to its customers.

“**CAD**” means Computer-Aided Design. Sometimes CADD (and Drawing) is used.

“**Certificate for Payment**” is a certificate issued by the professional responsible for the work to the owner to certify that portions of the work have been completed to the satisfaction of the professional.

“**Certificate of Substantial Performance**” refers to a certificate issued under the authority of the Ontario Construction Lien Act. The Act describes the conditions under which a contract is substantially performed.

“**Change Order**” If the decision is made to proceed with additional or different work, a Change Order signed by the owner is provided as authorization for the change. A Change Order is a change or amendment to the original contract for work. A Change Order authorizes additional work or changes in the work originally ordered. The owner and contractor should sign and exchange a copy of any Change Order indicating +acceptance of the change and the price or credit agreed upon for the change.

“**Construction Documents**” mean the detailed working drawings that define the work to be constructed. This may include key or site plans, demolition plans, partition plans, power and communications plans, reflected ceiling plans, material and finishes plans, and furniture layout plans, as well as elevations, sections and details, along with general notes and specifications and the drawings of associated consultants.

“Contemplated Change Order” When contract documents require clarification, or when changes are contemplated, the consultant is responsible for issuing further instructions to the contractor. If the additional instructions mean changes to the contract price and/or contract time, a proposed change or change directive should be issued for pricing by the contractor. A Change Order will then be issued authorizing the work to be carried out during construction phase.

“Contract Documents” means the set of documents that form a part of the legal contract for services between two or more parties. These typically include detailed instructions to the contractor; tender forms, construction documents and specifications.

“Contract Administration” means the set of services which may include developing and monitoring schedules and construction costs; ensuring construction is completed in conformance with contracts and design intent; liaison with contractors and consultants throughout the course of construction; reviewing shop drawings and submissions from the contractor; observing and commenting on construction progress; approving payments; monitoring move-in and furniture installation; issuing deficiency reports and monitoring rectification; and conducting required post-occupancy evaluations.

“Design Development” refers to the stage in a project involving space planning and the development of the design concept. This stage outlines the detailed organization of the space and illustrates the end result in terms of the “look and feel” of the space.

“Finishes” means the colours, materials and products (e.g. paint and floorcoverings) utilized on a project.

“Key plan” shows the location of the proposed project in the context of a large building or facility.

“LEED” means Leadership in Energy and Environmental Design. LEED ratings distinguish building projects that have demonstrated a commitment to sustainability by meeting higher performance standards in environmental responsibility and energy efficiency. Submission of a project for consideration must include detailed documentation of performance standards that are technically reviewed before being awarded Certified, Silver, Gold and Platinum ratings. The LEED system is administered in Canada by the Canada Green Building Council.

“Occupancy Permit” refers to a permit issued by the Chief Building Official (or a person designated by the Chief Building Official), authorizing occupation of a building. The Ontario Building Code outlines the conditions necessary to receive such a permit.

“Ontario Building Code” is a regulation made under the Building Code Act. The Code is a set of minimum provisions respecting the safety of buildings with reference to public health, fire protection and structural safety.

“Partition” means a wall which does not support a vertical load of a structure other than its own weight, but may support loads attached to it such as cabinetry, shelving or grab bars, and does not extend further than from the floor of an interior area of a

structure designed for human habitation or occupancy, to the underside of the deck of that structure.

“Prime Consultant” means the consultant who is retained directly by a client to coordinate the work of other specialists and consultants.

“Project Manager” means the person assigned by the client with authority to manage a project. This includes leading the planning and the development of all project deliverables. The Project Manager is responsible for managing the budget and schedule and all project management procedures (scope management, issues management, risk management etc.).

“Project Outline” is a template setting out specific information about the client, the project and the needs of the client.

“Program of Space Needs” refers to the document that organizes and interprets the information gathered in the programming phase.

“Programming” means the scope of work which includes, but is not limited to, conducting research; identifying and analyzing the needs and goals of the client and/or occupant(s) of the space; evaluating existing documentation and conditions; assessing project resources and limitations; and identifying life, safety and code requirements.

“Reflected ceiling plan” means a ceiling design that illustrates a ceiling as if it was projected downward and may include lighting, power and other elements.

“Scope of Services” is the listing of the services that are to be performed in the project.

“Terms of Reference” is a template setting out specific information about the owner, the project and the needs of the owner.

“Schematic Design” means the graphic layout and presentation of the space planning strategy. A schematic plan outlines the areas and blocks of space including blocking, stacking and adjacencies.

“Space planning” means the analysis and design of spatial and occupancy requirements, including, but not limited to, space layouts and final planning.

“Specifications” means the detailed written description of construction, workmanship and materials of the work to be undertaken.

“Stacking Plan” illustrates the use of space on a floor-by-floor basis.

“Sustainability” means the use of resources in such a way that they are not depleted; a method of practice or use of materials that is capable of being continued with minimal long-term effect on the environment.

“Wayfinding” is a succession of guides comprising signage and other visual, audible and tactile elements. Good wayfinding helps users get from point A to point B.