

Request for Proposals

Quantity Surveyor / Cost Consultant

The Neighbourhood Land Trust (NLT) is a non-profit organization dedicated to protecting the affordability, diversity, and equity of Parkdale by bringing land into community ownership and control. NLT works to acquire and manage land, leasing it at affordable rates to eligible charitable partners who provide community benefits including affordable and supportive housing. NLT is the charitable arm of the Parkdale Neighbourhood Land Trust (PNLT). Visit www.pnlt.ca for more information.

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PART 1 - INTRODUCTION

On April 1st 2022 The Neighbourhood Land Trust (NLT) acquired 81 single family homes and small multi-unit residential buildings from Toronto Community Housing. This social housing portfolio is operated by the YWCA Toronto as affordable rental housing, with a focus on serving women-led households. Over the next 5 years the NLT will invest over \$21mm in a 5-year Capital Repair and Improvement Plan to bring all 81 buildings into a State of Good Repair. Due to the diverse repair needs of the 81 properties, the repair program will be undertaken through a large number of small contracts with general contractors and preferred vendors. As required by our lender, the NLT requires the services of a Quantity Surveyor / Cost Consultant to provide Project status reporting and loan drawdown certification for a construction scope totaling \$17.9mm over a 5-year period.

This Request for Proposals (“RFP”) is an invitation by NLT, to prospective proponents to submit proposals for the provision of technical consulting services as further described in PART 2 - SCOPE OF WORK and including:

- Preliminary Report
- Monthly Project Reports and Drawdown Certification (July 2022-December 2026)
- Certificate of Project Completion

The proponent must provide a bid for all of the consulting services. A notice of this RFP is posted at http://www.pnlt.ca/wp-content/uploads/2022/05/RFP_NLT_Quantity-Surveyor-1.pdf

NLT is looking for an experienced Quantity Surveyor to act on our behalf to provide Project status reporting and loan drawdown certification for a 5-Year Capital Repair Program for 81 single family homes and small multi-unit residential buildings.

We're in search of a capable and efficient Quantity Surveyor / Cost Consultant who has expertise in small scale residential building renovation and who is willing to design a service approach that meets the unique characteristics of this project. The ideal candidate is as comfortable reviewing complex schedules and renovation budgets, as they are visiting a renovation site. It is also essential to have strong written communications skills to provide concise Project status reporting to our lender. Knowledge of sustainable building practices and social procurement is an asset.

We strongly encourage applications from residents of the West End of Toronto and or equity-deserving groups.

Type of Contract for Deliverables

The selected proponent(s) will be requested to enter into negotiations for an agreement with NLT for the provision of the Deliverables.

Timetable

Proponents should submit their proposal according to the following timetable and instructions.

Issue Date of RFP	Wednesday May 6, 2022
Last date for Questions	Monday May 9, 2022
Last date for Response to Questions	Wednesday May 11, 2022
Submission Deadline	Friday May 20th, 2022
Contract award	Wednesday June 1, 2022
Submission of Monthly progress reports	July 2022 - December 2026
Contract Completion	December 31 2026

The timetable is tentative only, and may be changed by NLT.
The Proponent is accountable to NLT and shall be diligent in carrying out this assignment in order that the project is completed on budget and on schedule.

NLT Contact

Contact	Monica Hutton, Property Asset Manager
Email	monicahutton@pnlt.ca

PART 2 - SCOPE OF WORK

Description of Deliverables

This Request for Proposals (“RFP”) is an invitation by The Neighbourhood Land Trust (NLT) to prospective proponents to submit proposals for the provision of technical consulting services for a large social housing portfolio. The services required include:

- Preliminary Report
- Monthly Project Reports and Drawdown Certification (July 2022-December 2026)
- Certificate of Project Completion

The proponent may provide a bid for all or part of the consulting services. The proponent may be a single company or multiple companies working together as a team.

2.1 Building Profiles

Please find a “Summary of Building Types” in Schedule E.

2.2 Scope of Deliverables

1. **Preliminary Report:** Prior to the first scheduled drawdown request, the Cost Consultant will prepare a Preliminary Report from discussions with the Borrower, their consultants, architects, engineers, construction and/or project manager and review available documentation including but not limited to:
 - a. Reviewing Project plans and specifications in the context of the Project Budget, applicable permits and municipal by-laws;
 - b. Reviewing all labour, material and equipment cost items, which are, or ought to be, included in the Project budget with a view to determining that such allowances are reasonable and complete;
 - c. Reviewing the proposed budget, cash flow projections, and drawdown schedule of all sources of funding, and advise of revisions thereto that may appear necessary so that remaining available funds as defined in the Loan Agreement are, in the Project Monitor’s opinion, sufficient to complete the Project within the time projected by the Borrower.
 - d. Reviewing contracts and/or construction material supply, labour and subcontractors, trade contracts (as applicable), for completeness and consistency with the Project description to determine any contract exclusions which may require Project budget adjustments;
 - e. Reviewing professional reports, briefs and due diligence reviews (as applicable);
 - f. Reviewing a detailed Project budget, separating into land, hard, and soft costs on an individual line item basis;
 - g. Reviewing insurance certificates to ensure that sum insured, insured parties, loss payable and period of coverage is appropriate.
 - h. Confirming that Project contingencies are considered adequate relative to the costs to complete the Project;

- i. Reviewing all labour, material, equipment and subcontractor cost items which are, or ought to be, included in the Project budget with a view to determining that such allowances are reasonable, adequate and complete;
- j. Reviewing Project cash flow projections showing on a monthly basis the cash inflows and outflows separately while identifying Borrower Equity, CMHC Loan drawdowns, and any other sources of financing (as applicable), as well as GST / HST (where any portion is refundable);
- k. Reviewing Project construction schedules in the context of the Project plans and specifications, general and head contracts, and confirming that the schedule is achievable;
- l. Reviewing soil tests, geotechnical reports and/or environmental assessments (as applicable), ascertaining how the analysis and recommendations therein will impact the Project budget, and ensuring that any recommendations are appropriately incorporated into the plans and specifications;
- m. Reviewing any such documents and data as is made available in the course of reviewing the Project budget with a view to ensuring to the fullest reasonable extent the adequacy of the Project budget, including but not restricted to:
 - i. Building permits;
 - ii. The Lender's Loan Agreements;
 - iii. Development, Municipal, Regional or Contribution Agreements;
 - iv. Management Agreements;
 - v. Consultant agreements including design, sales, marketing, management and legal.
- n. Addressing and delivering the Preliminary Report directly to the CMHC;
- o. Including in the Preliminary Report all documents and reports reviewed with commentary pertaining to the proposed technical, contractual, operational and financial aspects of the Project, including:
 - i. Key findings – positive and negative, as applicable;
 - ii. Confirmation of the Project budget, cash flow and construction schedule;
 - iii. Review and commentary on all executed change orders and confirmation that adequate funding is in place to cover the cost of any additions to the scope of work. Confirmation that the required additional owner's equity contribution into the Project is in accordance to the contractual agreements in place;
 - iv. Commentary on any potential or foreseeable problem areas or such other matters, if any, that have been identified and which may affect completion of the Project in accordance with the budget and construction time schedule;
 - v. An opinion, based on the engineering and other consultants data reviewed, as to whether the projected output is reasonable or not;
 - vi. Confirmation that the Borrower has entered into sufficient fixed price contracts or construction management "at risk" agreements as required under the Commitment Letter;

- vii. Confirmation that all sources of financing, including but not limited to, the Borrower Equity has been invested as required under the Commitment Letter (as applicable);

2. **Project Reports and Drawdown Certification:** The Cost Consultant is expected to complete an inspection on a no less than monthly basis and which should be done at the request of, and coordinated with, the NLT, giving reasonable notice of inspection requirements. The Project Reports are to be prepared monthly for the duration of the Project until Total Completion has been achieved. The Project Reports shall incorporate the following:

- a. Brief executive summary summarizing the Project status;
- b. General construction progress including work completed over the month as compared to plan and any emerging Project risk issues that may impact scope, budget or schedule, along with recommendation for budget and schedule revisions and identified deficiencies with remediation plans;
- c. Project scope summary of any material or equipment changes to the approved plans and specifications and commentary on the foreseeable impact of such changes on the final project delivery.
- d. Updated Project budget, separated into land, hard, and soft costs as individual line items with details (including material quantities as well as labour and equipment costs) and compared to the initial Project budget including:
 - i. Costs incurred to date, cost to complete, and variance analysis;
 - ii. List of approved change orders (with summary scope description including detailed material, labour and equipment costs and rationale);
 - iii. List of contemplated change orders (with summary scope description including detailed material, labour and equipment costs and rationale);
 - iv. Forecasted cost to complete with variance from baseline budget analysis;
- e. Updated Project cash flow projections including any approved change orders and/or changes in scope of work, together with comments on any material variances from the original baseline, and drawdown schedule of all sources of funding;
- f. Construction schedule status as compared to baseline including:
 - i. Approved schedule variances with rationale and recommendations for schedule revisions;
 - ii. Contemplated schedule variances with rationale and status of approval;
 - iii. Forecasted completion date with variance from original baseline and rationale;
 - iv. Any updated municipal approvals, permits, or any other authorizations having jurisdiction (as applicable).
 - v. Insurance and bonding status (where applicable);
- g. Copies of all certificate(s) or declaration(s) from the contractor(s), subcontractor(s) and/or consultant(s) as the Cost Consultant deems necessary to certify that construction is being performed in accordance with the approved

plans and specifications and complies with the applicable permit(s), municipal by-laws and the applicable code(s);

- h. Monthly reviews of cancelled cheques;
 - i. Certification of the amount of each drawdown requested by the Borrower based on invoices submitted for payment through completion of the Cost-In-Place Margin and Cost to Complete (as defined in the Loan Agreement).
 - j. Identification of the value of holdbacks retained to date, compliance with the Construction Lien Act, and any lien notifications;
 - k. A notarized Statutory Declaration prepared by the Borrower and Cost Consultant will be required confirming the same;
 - l. A copy of the Borrower's drawdown request (see Schedule G) must accompany monthly reports;
 - m. A drawdown request (see Schedule G) in the form specified in the Loan Agreement and the NLT may request an advance to be made on either the 1st or the 20th day of any calendar month (or the next business day following such date if such date is not a business day).
3. **Project Completion:** upon completion, the Cost Consultant is to provide a "Certificate of Substantial Completion" certifying that all required work under each Construction Contract in respect of the Project has been fully completed.

PART 3 - PROPOSAL SUBMISSION

ELECTRONIC PROPOSAL SUBMISSION ONLY, should be emailed to monicahutton@pnlt.ca. Hardcopy submissions not permitted.

NLT does not accept responsibility for technical issues such as network outages or computer issues that may result in errors in a submission or cause a submission to be late.

Proposals should be submitted no later than 11:00 a.m. local time, **Friday May 20th, 2022.**

Proponents should submit one (1) electronic PDF copy of the Proposal Requirements outlined in Part 4. Proposals are to be prominently marked with the RFP title and the full legal name and address of the proponent. Submissions may be changed after they have been submitted, if received before the stated deadline on **Friday May 20th, 2022.**

Questions should be emailed to monicahutton@pnlt.ca no later than Monday May 9, 2022. A summary of responses to questions will be provided no later than Wednesday May 11, 2022.

Evaluation

Each proposal will be evaluated by NLT based on the demonstrated understanding of the project requirements, the qualifications and experience of the proponent, the capacity to meet timeline and objectives, as well as the financial proposal. A short list of firms may be created for review and for the purposes of an interview. Proponents may be contacted to explain or clarify their proposals. NLT reserves the right to place emphasis on certain aspects of the proponent's application however it may deem appropriate.

NLT is committed to social procurement and employment equity and encourages submissions from proponents which identify under one or more of the following categories:

- Non-profit, social enterprise or cooperative;
- BIPOC owned or led;
- The extent to which the proponent hires equity deserving groups; and
- The proponent is a decent wage and/or living wage employer.

Each proposal will be reviewed to determine if the proposal is responsive to the Proposal Requirements outlined in Part 4 of the RFP. Failure to comply with these requirements may result in the proposal being deemed non-responsive.

PART 4 - PROPOSAL REQUIREMENTS

The submission should include all of the information listed in this section. The proponent should provide information of sufficient scope and depth to demonstrate the ability of the proponent to adequately deliver the services described in this RFP.

Applicant Summary Form (Part 1) - Please fill out the Form in Schedule A.

Technical Proposal (Part 2)

1. **Qualifications and Staffing** - Please describe your qualifications for this scope of work. Consider including the following information:
 - Proponent introduction including qualifications to undertake this work. Please include all relevant licences.
 - If relevant, please provide a list of the team member(s) (including all subconsultants) assigned to this contract, identifying the number of years' experience in each discipline and relevant certifications / credentials for each. Please ensure that any subconsultants are listed as such and the nature of your working history.
 - Indicate the number of years you or your team has been performing Quantity Survey and or Cost Consultant services, and describe your professional experience related specifically to building retrofits.

2. **Project Approach & Scope** - Please describe how you or your team will approach this work. Consider including the following information:
 - Your approach to undertaking Preliminary Reporting,
 - Your approach to undertaking Project Reports and Drawdown Certifications,
 - A summary of your site inspection routine, and
 - Your approach to ensuring consistent and accurate review and reporting.

3. **Project Management & Quality Assurance**
 - Describe tools that will be used to provide the services described in the Scope.
 - Describe tools that will be used to prepare and track the Project schedule, identify the risks which may impact the Project schedule and steps that will be used to mitigate those risks.

4. **Examples of Work** - Please provide the following samples:
 - A sample of a Project Report and Drawdown Certification report as an Appendix.

5. **Financial Proposal Bid Form (Part 4)** Please fill out the Form in Schedule C.

Schedule A: Applicant Summary Form

Lead Proponent Information:

Lead Proponent / Company Name	
Contact person	
Email	
Phone	
Company website	
Company Size (Staff)	
If applicable, please list and qualify any of the following categories that your company identifies under: <ul style="list-style-type: none"> • Non-profit, social enterprise or cooperative • BIPOC owned • Intentional employment of equity-deserving people • Owned by resident of Parkdale 	

Additional Proponent Information (Optional):

Additional Proponent Name	
Contact person	
Email	
Phone	
Company website	
Company Size (Staff)	
If applicable, please list and qualify any of the following categories that your company identifies under: <ul style="list-style-type: none"> • Non-profit, social enterprise or cooperative • BIPOC owned • Intentional employment of equity-seeking people • Owned by resident of Parkdale 	

Schedule B: List of Subconsultants (if applicable)

The following are the Subconsultants which the proponent is proposing for a portion of the Work:

Section(s) of Work	Name of Subconsultant (include full legal name and address)

Schedule C: Financial Proposal Bid Form

Proponents are required to provide a total estimated cost including disbursements for the Work proposed. Fees & expenses shall not include contingencies and HST.

Price Breakdown of Bid Contract Price as follows:

Description of Work	Contract Price (\$) If your proposed pricing does <u>not</u> include services in any of the below fields please indicate by writing "N/A"
A) <u>Preliminary Report</u>	
B) <u>Monthly Project Reports and Drawdown Certification</u> (July 2022-December 2026)	* Please list a price per year as well as for the full 5-year period.
C) <u>Certificate of Project Completion</u>	
Total Contract Price:	

Schedule D: List of Properties

	Address	GFA	Year Built
1	11-13 Albany Ave. 11, 11A, 11 B, 13, 13A, 13B	4,500	1983
2	6 Archer St.	864	1910
3	311 Atlas Ave.	1,152	1927
4	13 A Auburn Ave.	1,055	1914
5	124 Benson Ave.	1,274	1913
6	102 Blackthorn Ave.	1,080	1920
7	115 Bristol Ave.	1,034	1913
8	129 Bristol Ave.	818	1976
9	25 Britannia Ave.	1,090	1916
10	34 Brookside Ave.	1,206	1920
11	316-318 Brunswick Ave. 316, 316A, 316B, 318, 318A, 318B	8,245	1983
12	111 Campbell Ave.	1,040	1911
13	58 A Chambers Ave.	1,094	1925
14	585 Clendenan Ave.	1,220	1900
15	337 A Concord Ave.	878	1921
16	1208 Davenport Rd.	985	1919
17	42-48 Delaney Cres.	4,460	1967
18	280 Delaware Ave.	1,132	1900
19	402 Delaware Ave.	1,432	1910
20	1132 Dovercourt Rd.	1,062	1913
21	2529 Dundas St. W.	1,138	1904
22	3225 Dundas St. W.	1,008	1901
23	49 Fermanagh Ave.	1,278	1909
24	34 Fern Ave.	996	1885
25	66 Fuller Ave.	1,168	1890
26	8 Grenadier Rd.	1,220	1914
27	30 Harvie Ave.	1,294	1912

28	110 Havelock St.	1,707	1900
29	110 1/2 Havelock St.	1,669	1920
30	112 Havelock St.	1,442	1976
31	15 Howland Ave. 15, 15A, 15B	3,000	1983
32	16-18 Howland Ave. 16, 16A, 16B, 18, 18A, 18B	5,740	1983
33	480 Huron St.	3,260	1888
34	482 Huron St.	3,440	1888
35	492 Huron St.	3,022	1910
36	494 Huron St.	3,385	1885
37	44 Jerome St.	1,118	1905
38	2 Lindsey Ave.	1,332	1909
39	13 Madison Ave.	3,300	1889
40	21 Madison Ave.	3,349	1890
41	25 Madison Ave.	10,500	1889
42	27 Madison Ave.	1,350	1889
43	907 Manning Ave.	796	1903
44	254 Maria St.	1,680	1989
45	114 A, B Maria St.	2,248	1967
46	122 A, B Maria St.	2,248	1967
47	198 Mavety St.	1,354	1880
48	415 Maybank Ave.	1,454	1966
49	417 Maybank Ave.	1,474	1966
50	419 Maybank Ave.	1,488	1966
51	421 Maybank Ave.	1,494	1966
52	61 Mulock Ave.	1,182	1901
53	79 Mulock Ave.	1,266	1898
54	31 Noble St.	1,530	1880
55	1201 Ossington Ave.	1,360	1914
56	38 Parkview Gardens	1,432	1922

57	118 Paton Rd.	1,082	1915
58	121 Paton Rd.	1,104	1912
59	191 Perth Ave.	1,212	1910
60	194 Prescott Ave.	914	1920
61	254 Prescott Ave.	906	1914
62	513 Quebec Ave.	1,154	1900
63	524 Quebec Ave.	1,440	1890
64	121 Rockwell Ave.	1,008	1976
65	132 Rockwell Ave.	974	1915
66	876 Runnymede Rd.	1,052	1913
67	16 Saunders Ave.	1,105	1890
68	32 1/2 St. Clair Gardens	1,020	1964
69	508 St. Clarens Ave.	1,096	1903
70	1009 A St. Clarens Ave.	1,054	1910
71	2 Sylvan Ave.	2,182	1923
72	4 Sylvan Ave.	2,070	1915
73	6 Sylvan Ave.	1,840	1920
74	2 A, 2 B Sylvan Ave.	2,406	1923
75	289 Wallace Ave.	1,218	1915
76	136 West Lodge Ave.	1,149	1910
77	357 Westmoreland Ave. N.	2,290	1989
78	262 Old Weston Rd.	1,374	1910
79	68 Mcroberts Ave.	1,194	1907
80	128 Havelock St.	3,589	1910
81	23 Madison Ave.	2,582	1890

Schedule E: Summary of Building Types

Please note that information provided is best-known / approximate - all details are to be confirmed by the successful bidder.

Asset Type:	Quantity
2 Storey Detached House Single Family	4
2 Storey Detached House Duplex	1
2 Storey House Fourplex	3
2 Storey Detached House Fiveplex	2
2 Storey House Sixplex	1
2 Storey Semi-Detached House Single Family	38
2 Storey Semi-Detached Duplex	4
2 Storey Semi-Detached House Fiveplex	1
2 Storey Row House Single Family	7
2.5 Storey Detached House Single Family	1
2.5 Storey Detached House Duplex	2
2.5 Storey Detached House Triplex	1
2.5 Storey Semi-Detached House Single Family	3
3 Storey House Duplex	1
3 Storey Semi-Detached House Triplex	1
3 Storey Semi-Detached House Fiveplex	3
3 Storey Semi-Detached House Multiplex	2
3 Storey Townhouse	4
3 Storey Apt Building & 3 Storey Houses	2
TOTAL	81

Schedule E: CMHC Form Drawdown Notice

TO: Canada Mortgage and Housing Corporation (“**CMHC**”)
FROM: _____ (the “**Borrower**”)
DATE: _____¹

1. This Drawdown Notice is delivered pursuant to the loan agreement made as of _____ between the Borrower, CMHC and any Guarantors party thereto, as the same has been amended or modified to the date hereof (the “**Agreement**”). All terms used in this Drawdown Notice that are defined in the Agreement have the same meanings herein.
2. The Borrower hereby request the following Drawdown:
 - (a) Drawdown Date: _____
 - (b) Repayable Loan Drawdown Amount: _____
 - (c) Forgivable Loan Drawdown Amount: _____
3. All of the representations and warranties of the Borrower contained in the Agreement and the representations and warranties of the Borrower contained in the other Loan Documents are true and correct on and as of the date hereof as though made on and as of the date hereof, subject to changes thereto:
 - (a) given to CMHC by the Borrower and accepted in writing by CMHC; and
 - (b) expressly contemplated by the terms of the Agreement and disclosed to CMHC in writing.
4. All of the conditions precedent to the Drawdown requested hereby that have not been properly waived in writing by or on behalf of CMHC have been satisfied.
5. No default or Event of Default has occurred and is continuing or will have occurred and be continuing on the Drawdown Date, or will result from the Drawdown requested hereby.

[Signature page to follow immediately]

¹ **Client-facing Note to Borrower:** This date must be at least ten (10) Business Days prior to the first Drawdown Date and at least ten (10) Business Days prior to any other proposed Drawdown Date.

Schedule F: CMHC Project Consultant's Certificate

TO: Canada Mortgage and Housing Corporation ("CMHC")	BORROWER: _____
ADVANCE NO: _____	PROJECT ADDRESS: _____
CERTIFICATE DATE: _____	COMPLETION DATE: _____

Based on my/our professional experience and qualifications and after making such reasonable enquiries as I/we have deemed necessary in the circumstances, I/we hereby certify to CMHC as follows:

1. I/we have periodically inspected execution of the Construction since the commencement of execution of the Construction and last inspected the Project on _____ (the "**Inspection Date**").
2. All required permits, licenses and other authorizations have been obtained and are being maintained.
3. Execution of the Construction and development of the Project up to and including the Inspection Date has been performed in a good and workmanlike manner. [Subject to Note 1 below]
4. Execution of the Construction and development of the Project up to and including the Inspection Date has been performed substantially in accordance with (i) the plans and specifications, (ii) all applicable building codes, municipal bylaws and regulations, (iii) all required permits, licenses and other authorizations and (iv) all Applicable Laws, including, for the avoidance of doubt, Environmental Laws. [Subject to Note 1 below]
5. In my/our opinion, as of the date hereof, the figures set forth below accurately reflect the Project costs or work completed on the Project and the costs of the remaining work required to complete the Project in accordance with the plans and specifications. A report setting out in greater detail those elements comprising the figures set out below is attached hereto and forms part of this Certificate.

(a) Project costs of work completed to date:	\$ _____
(b) Project costs of remaining work:	\$ _____
(c) Estimated total Project costs (a+b):	\$ _____ 0.00
(d) Original estimate of total Project costs:	\$ _____
(e) Amount of additional costs, if any (c-d):	\$ _____
6. In my/our opinion, as of the date hereof, the remaining contingency reserve of \$ _____ contained in 5(b) above is adequate given the current state of work in place and contracts entered into to complete the Project.
7. In my/our opinion, as of the date hereof, the estimated date of completion of the Project is _____. Reasons for delay, if applicable, are outlined in the attached Exhibit. I have reviewed the Drawdown Schedule provided to CMHC and confirm that it remains accurate as of the date hereof or an updated drawdown schedule has been provided to CMHC in the form required by CMHC.

This certificate is given in connection with the above-referenced advance under your credit agreement with the Borrower dated _____ and you may rely upon it in making such advance.

Dated at _____, _____, this _____ day of _____ 20__.

Consultant: _____

Per:
Name: _____
Title: _____

Note 1: Cost consultants are not qualified to confirm that construction work has been completed in accordance with plans and specifications or applicable laws. In this regard, you will find in our report a certificate provided by the Project's architect to confirm that the Project is being constructed in accordance with the approved plans and specifications and all applicable laws on which we have relied. Also enclosed are inspection reports/certificates from all other design consultants including but not limited to structural engineer, mechanical and electrical engineering, and shoring consultants, on which we have relied.

END OF DOCUMENT