For detailed instructions on how to complete this document, click [ ¶ ] icon under Home tab to display Hidden Help text.

**Document Purpose**:

The Change in Scope of Services (CSS) serves as the vehicle to issue a formal notice of a change to a Consultant Services Contract in accordance with the applicable General Conditions for Consultant Services.

A CSS is issued by the Consulting Contract Administrator for Consulting Contracts.

The proper processing and documentation of Contract changes is critical. The user should familiarize themselves with the provisions of the applicable Contract General Conditions as well as the processes and procedures documented in the City of Winnipeg Asset Management – Project Management Manual (PMM) prior to authorizing Contract changes.

*Refer to PMM Section 7.2 Perform Integrated Change Control.*

**To ensure the current version of the template is used**, it is recommended that the template is downloaded each time from the Corporate Asset Management Office website.

|  |  |  |  |
| --- | --- | --- | --- |
| **CSS Title:** Enter a brief title for use as reference. |   | **CSS No.:** Enter the successive CSS Number. Refer to CSS Log. This field will auto-populate in the header. | Click here to enter number. |
|   |
| **Project Name:** Enter the subject contract name in full. |   | **Date:** Select the date this CSS is initiated from the drop-down menu. | Click here to enter a date. |
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| **Consultant** |
| Company: Enter the Legal Business Name of the Consultant |   | Consultant Ref. No.: Enter the Reference Number used by the Consultant for their filing/records purposes. |   |
| Contact: Enter the name of the contact person having delegated authority to represent the Consultant. |   | RFP No.: Enter the RFP Number used to identify the Tender of the subject contract as issued by the City of Winnipeg Materials Management Division. |   |
|   |
| **City Project Manager** The City Project Manager is the City of Winnipeg employee having delegated authority to deliver the project. |
| Name: Enter the name of the Project Manager |   | City File No.: Enter the City File Number assigned by the department for this project. |   |
| Title: Enter the position title of the Project Manager. |   | Project ID: Enter the City-issued Project ID which represents the Capital Funding Source to the subject contract. The Project ID can be found on the Capital Budget Sheet. |   |
| Dept.: Enter the reporting department of the Project Manager |   | Project Record Index No.: Enter the City-issued Project Record Index Number. Refer to *PMM Section 5.8.8 Project Record Index (PRI)*. |   |
|   | Purchase Order No.: Enter the City-issued number assigned to the Consultant which authorizes billing for work delivered within the subject contract. |   |
| **Consulting Contract Administrator (CA)** The Consulting Contract Administrator may be a City Staff or an external person representing a third-party company having delegated authority to administer the subject contract. |
| Name: Enter the name of the CA. |   | CA Reference No.: Enter a reference number used by the external/non-City CA for their filing/records purposes. |   |
| Title: Enter the position title of the CA. |   |   |
| Organization: If CA is third-party company, enter the company name. If CA is City Staff, enter the reporting department. |   |
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| **Additional Information** (if applicable) |
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| **Reason / Description for Change in Scope of Services** Enter a brief statement outlining the reason for the Change in Scope of Services that impacts the Contract.Include all details from the Proposed Change Notice (PCN) or formal request for Scope Change documentation generated by the Consultant. |
|   |

**Change Classification**

The Change Classification Codes are used to identify the reason for a change to a project and are used in the Contract Change Log.

Change Classification Codes are important. For example, a Major Capital Project may need to bring large numbers of ‘user requests’ to the Project Sponsor’s attention if the changes result in significant increases in contract time or amount.

For further information, refer to the *Change Classification Codes on CAMO website.*

Select ONE classification that best fits the reason for the project change.

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|[ ]  **CE –** Construction Error A faulty or shoddy work where a feature designed by an architect or workmanship provided by a contractor reduces the value of a construction project |[ ]  **FM** – Force Majeure A change where a Contractor is delayed in the performance of the Work by reason of strikes, lock-outs (including lock-outs decreed for its members by a recognized contractors’ association of which the Contractor is a member), an Act of God, or any other cause which the Contractor satisfies the Contract Administrator to be totally beyond his control. Consultation with Legal Services is recommended prior to categorizing a change as FM. |
|[ ]  **CS –** Cost Saving A change in scope of work that results in a credit to the project’s construction contract amount. |[ ]  **OC** – Owner Change A change requested by the Owner or Sponsoring Department to improve the appearance or functionality. |
|[ ]  **DC –** Delay Costs General Conditions costs (overhead) or other costs incurred by the Contractor directly resulting from delays caused by the City through no act or fault of the Contractor. |[ ]  **RC** – Regulatory Change Additional work is required due to change in law or regulation or due to unforeseen requirements of a Regulator on the project. |
|[ ]  **DD** – Design Deficiency Change resulting from a design error or from a design omission where it should have reasonably been anticipated by the consultant team and included in the Contract Documents. Costs may be recoverable from Consultant. |[ ]  **SC** – Site Construction Additional construction required due to unforeseen circumstances, such as conditions uncovered in excavation or building demolition, which could not be anticipated during the design process. |
|[ ]  **DI** – Design Improvement Scope increase or change to improve the project design or performance. |[ ]  **TP** – Third Party Impacts Changes brought about by the action or inaction of external agencies. |

**Details of Change in Scope of Services / Contract Value / Cost to Project**

Double-click the table to open the Excel worksheet, and enter the required information.

**PCN #**: Enter the Proposed Change Notice (PCN) number associated with the Change in Scope of Services, if any.

**PCN Change Item #**: Enter the PCN Change Item number. If any.

**Item Description**: Enter a brief accurate description of the Change Item.

**Change in Contract Value**: Enter the dollar value of the Change Item *excluding* GST and *excluding* MRST, if applicable.

**MRST Status**: Select the status from the drop-down menu options:
(a) Exempt, (b) Vendor Amount (c) Vendor Amount & Self Assessed (d) Self Assessed

**MRST Vendor Amount**: Enter the amount of the MRST Vendor Amount, if applicable.
If not applicable, enter “0” (numeric zero
For more information about MRST, refer to the following web links
or contact the City of Winnipeg, Corporate Finance Department’s Commodity Tax & Financial Systems Specialist at: 204.986.2190.

 Note: When a MRST Declaration is required to be obtained from the Consultant, it also needs to be attached to the CSS and the amounts need to match.

**Total Contract Change Amount** Auto-calculates the sum of the *Change in Contract Value* and *MRST Vendor Amount* fields.

**MRST Self Assessed Amount**: Enter the amount of the City’s MRST Self Assessed Amount, if applicable.
If not applicable, enter “0” (numeric zero)

**Cost to Project**: Auto-calculates the sum of the *Change in Contract Value ,MRST Vendor Amount* and MRST Self Assessed fields.

**To add a Row in the Details Worksheet**

1. Click to the second last row just above the `Totals`row, in the row # column.
2. Right click and select `copy``
3. Right click and select “ìnsert`copied cells” which copies all the formulas and formats to the new blank row.
4. Save the document.

**To Resize the display of the table:**

1. Click anywhere in the excel sheet.
2. Note the row numbers, column letters and sheet tabs appear.
3. Click and grab the bottom of the excel sheet’s box resize handle and drag to the size required to display the table correctly.
4. Save the document.

**Web Resources for MRST**

Information for consultants/contractors:

 <http://www.gov.mb.ca/finance/taxation/pubs/bulletins/005.pdf>

Clarification of real property (RP) versus tangible personal property (TPP):

 <http://www.gov.mb.ca/finance/taxation/pubs/bulletings/008.pdf>

Information specific to municipalities:

 <http://www.gov.mb.ca/finance/taxation/pubs/bulletins/019.pdf>

Information specific to engineering:

 <http://www.gov.mb.ca/finane/taxation/pubs/bulletins/058.pdf>



***Note:*** *Attach MRST Declaration if Self Assessed MRST Amounts are applicable.*

**Adjustment of Contract Price**

Refer to the *Valuation of a Change in Services in General Conditions for Consultant Services C8.4(a-c), C8.4.1, and C8.4.2.*

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| --- | --- | --- |
| **Change in Contract Value:** | **$** | 0.00 Enter value.  |
| **Value of Change in Services**The adjustment in Contract Price resulting from the Change in Services is determined by one or more of the following methods: (Select the applicable checkboxes.)[ ]  (a) by estimate in a lump sum.[ ]  (b) by the unit prices and methods of measurement as set out in the Contract or subsequently agreed upon.[ ]  (c) by the actual cost of the Change in Services to the Consultant plus a fixed fee. |

 ***Note:*** *Indicate the Value of the Actual Contract Price change in the Proposed Change Notice (PCN) - Consultant.*

**Effect of Change**

1. Does the Change in Scope of Services affect the Schedule? [ ]  Yes [ ]  No

If Yes, enter a description of the effect on the Schedule.

|  |
| --- |
|   |

1. Does the Change in Scope affect the Contract Price? [ ]  Yes [ ]  No

|  |  |  |  |
| --- | --- | --- | --- |
| The Contract Price: | [ ]  Increases | [ ]  Decreases | [ ]  No Change |
| by:  | $ | 0.00 Enter value. |

**Note:**  *Attach supporting documentation for the Contract Price change.*

 Double-click the table below to open the Excel worksheet, and enter the required information.

Enter the Original Award Price, previous additions/deletions, and this change authorization. Revised Contract Price is automatically calculated and is not an editable field.



**Authorization**

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Date City Project Manager (signature)

Click here to enter name of City Project Manager

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Date Consulting Contract Administrator (signature)

Click here to enter name of Consulting Contract Administrator.

***Note:*** *Based on supplementary departmental processes, a Project Sponsor’s signature may be required.*

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Date City Project Sponsor (signature)

Click here to enter name of City Project Sponsor

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| --- | --- |
| **Attachment(s):** Enter the title(s) of the attached documents, or enter “0” if none. | \_\_\_\_\_\_\_\_\_\_\_\_\_ |

**Distribution** (to be completed by Consulting Contract Administrator) List of personnel to forward the document to. Once completed, this document should be distributed in PDF format to ensure no changes are made.

* Consulting Contract Administrator
* City Project Manager
* Other: Enter names(s), Department/Company

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