

**SCHEDULE A – RISK POOL DISTRIBUTION**

**Version:** \_\_\_\_\_

**Date:** \_\_\_\_\_

ESTABLISHMENT OF RISK POOL		RISK POOL ADJUSTMENTS			MILESTONE PAYMENTS							
IPD Party	At Acceptance of Validation Report	Upon Acceptance of Added Value Incentive Items**	Upon establishing the Final Target Cost	Upon Completion of Warranty Phase	Milestone 1***	Milestone 2	Milestone 3	Milestone 4	Milestone 5	Milestone 6	Milestone 7+	End of Warranty Phase
Contractor	\$	\$	\$	\$	\$	\$	\$	\$	\$			
Consultant	\$	\$	\$	\$	\$	\$	\$	\$	\$			
Other IPD Party	\$	\$	\$	\$	\$	\$	\$	\$	\$			
Other IPD Party*	\$	\$	\$	\$	\$	\$	\$	\$	\$			
Added Party*												
<b>TOTAL RISK POOL</b>	\$											

\*as necessary

\*\*add columns as necessary to address any additional Added Value Incentive Items throughout the project

\*\*\*in most cases, Milestone 1 is the acceptance of the Validation Report

+insert the Milestones as identified in the Validation Report

**SCHEDULE B – ALLOWED COSTS**

<b>COSTS</b>
.1 salaries, wages and benefits paid to personnel in the direct employ of the <i>Design/Construction Team</i> members under a salary or wage schedule agreed upon by the <i>Owner</i> and the <i>Design/Construction Team</i> , or in the absence of such a schedule, actual salaries, wages and benefits paid under applicable bargaining agreement, and in the absence of a salary or wage schedule and bargaining agreement, actual salaries, wages and benefits paid by the <i>Design/Construction Team</i> , for personnel: (1) stationed at the <i>Design/Construction Team</i> field office, in whatever capacity employed; (2) engaged in expediting the production or transportation of material or equipment, at shops or on the road; (3) engaged in the preparation or review of shop drawings, fabrication drawings, coordination drawings, and <i>Project</i> record drawings; or (4) engaged in the processing of changes in the <i>Design Services</i> or in the <i>Work</i> .
.2 contributions, assessments or taxes incurred for such items as employment insurance, provincial or territorial health insurance, workers' compensation, and Canada or Quebec Pension Plan, insofar as such cost is based on wages, salaries, or other remuneration paid to employees of the <i>Design/Construction Team</i> and included in the cost of the <i>Work</i> ;
.3 travel and subsistence expenses of the <i>Design/Construction Team's</i> personnel;
.4 all products including cost of transportation thereof;
.5 materials, supplies, construction equipment, and temporary work, including transportation and maintenance thereof, which are consumed in the performance of the <i>Work</i> , and cost less salvage value on such items used but not consumed, which remain the property of the <i>Design/Construction Team</i> ;
.6 hand tools greater than a value of \$ _____, not owned by the workers, including transportation and maintenance thereof, which are consumed in the performance of the <i>Work</i> , and cost less salvage value on such items used but not consumed, which remain the property of the <i>Design/Construction Team</i> ;
.7 all tools and construction equipment, exclusive of hand tools used in the performance of the <i>Work</i> , whether rented from or provided by the <i>Design/Construction Team</i> or others, including installation, minor repairs and replacements, dismantling, removal, transportation, and delivery cost thereof;
.8 all equipment and services required for the <i>Design/Construction Team's</i> field office;
.9 deposits lost;
.10 the cost of disbursements of the <i>Consultant</i> and other consultants engaged to perform such <i>Design Services</i> ;
.11 costs paid to subcontractors and subconsultants;
.12 quality assurance such as independent inspection and testing services;
.13 charges levied by authorities having jurisdiction at the <i>Place of the Work</i> ;
.14 royalties, patent license fees and similar charges for intellectual property rights;
.15 any premiums for all bonds and insurance which the <i>Design/Construction Team</i> is required, by the <i>Contract Documents</i> , to purchase and maintain;
.16 any taxes, other than <i>Value Added Taxes</i> , and duties for which the <i>Design/Construction Team</i> is liable;
.17 removal and disposal of waste products and debris;
.18 safety measures and requirements;
.19 such further allowed costs as listed below*:

\*parties should consider and address other potential items of allowed costs, e.g. small hand tools and consumables, etc.

**SCHEDULE C – TIME-BASED COSTS**

Version: \_\_\_\_\_

Date: \_\_\_\_\_

Personnel Category	Base Hourly Cost* (Excluding Both Overhead and Profit)	Overhead (Article 5.2)		Total
		Percentage	Amount	
<b>Design Team</b>				
		%	\$	
		%	\$	
		%	\$	
		%	\$	
		%	\$	
<b>Construction Team</b>				
		%	\$	
		%	\$	
		%	\$	
		%	\$	
		%	\$	
<b>Other IPD Party</b>				
		%	\$	
		%	\$	
		%	\$	
		%	\$	
		%	\$	

\*includes costs referred to in Schedule B – ALLOWED COSTS, items .1 and .2

**SCHEDULE D – CONTRACT TASKS MATRIX**

**Version:** \_\_\_\_\_

**Date:** \_\_\_\_\_

ACTIVITY	CONTRACTOR			OWNER			CONSULTANT			OTHER IPD PARTY		
	Name	Name	Name	Name	Name	Name	Name	Name	Name	Name	Name	Name
Validation Phase												
Design/ Procurement Phase												
Construction Phase												
Warranty Phase												

LEGEND: R= Responsible; A= Accountable; C= Consulted; I= Informed

**SCHEDULE E – ADDED PARTY**

This Schedule E – ADDED PARTY is dated the \_\_\_\_\_ day of \_\_\_\_\_, in the year \_\_\_\_\_.

The parties to the *Contract* and the *Added Party* do hereby agree:

1. The following shall be an *Added Party* to the *Contract*:

Name of party:

Address of party:

Email address of party:

2. Attached hereto shall be the following revised Schedules which shall include all changes and adjustments necessary to reflect the addition of the *Added Party*:

- Revised Schedule A – RISK POOL DISTRIBUTION, dated:
- Revised Schedule B – ALLOWED COSTS, dated:
- Revised Schedule C – TIME-BASED COSTS, dated:
- Revised Schedule D – CONTRACT TASKS MATRIX, dated:

Each of these revised Schedules shall supercede and replace all previous versions of each corresponding Schedule.

3. The following shall be the representatives of the *Added Party* for purposes of this *Contract*:

*SMT* representative:

*PMT* representative:

For the purposes of paragraph 5.2 of Article 5 of the Agreement – REIMBURSABLE COSTS, overhead is \_\_\_\_\_ % of the *Reimbursable Costs* attributable to this *Added Party*.

For the purposes of Article A-7 of the Agreement – RECEIPT OF AND ADDRESSES FOR NOTICES IN WRITING:

Name:

Address:

Email address:

For purposes of Article A-8 of the Agreement – RECEIPT OF AND ADDRESSES FOR OTHER NOTICES INVOLVING THE SMT AND PMT:

SMT Representative:

Name:

Address:

Email address:

PMT Representative:

Name:

Address:

Email address:

4. The *Added Party*, together with the other parties to the *Contract*, shall be parties to the *Contract* for all purposes following the date of execution of this Schedule E – ADDED PARTY, and the *Contract* shall be deemed to be restated accordingly and all other terms and conditions of the *Contract* shall continue in full force and effect.

**In witness whereof** the parties hereto have executed this Schedule E – ADDED PARTY by the hands of their duly authorized representatives.

SIGNED AND DELIVERED  
in the presence of:

**WITNESS**

*signature*

*name of person signing*

**WITNESS**

*signature*

*name of person signing*

**WITNESS**

*signature*

*name of person signing*

**WITNESS**

*signature*

*name of person signing*

**WITNESS**

*signature*

*name of person signing*

**OWNER**

*name of Owner*

*signature*

*name and title of person signing*

**CONSULTANT**

*name of Consultant*

*signature*

*name and title of person signing*

**CONTRACTOR**

*name of Contractor*

*signature*

*name and title of person signing*

**ADDED PARTY**

*name*

*signature*

*name and title of person signing*

**OTHER IPD PARTY**

*name*

*signature*

*name and title of person signing*

*\* All Other IPD Parties signatory to the Contract as at the date of Schedule E must execute this Schedule E. Insert other signature pages as may be necessary.*

**WITNESS**

*signature*

*name of person signing*

**WITNESS**

*signature*

*name of person signing*

**WITNESS**

*signature*

*name of person signing*

**WITNESS**

*signature*

*name of person signing*

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*name and title of person signing*

**OTHER IPD PARTY \***

*name*

*signature*

*name and title of person signing*

**OTHER IPD PARTY \***

*name*

*signature*

*name and title of person signing*

**SCHEDULE F – USE OF BIM**

*[insert the agreed BIM protocol. If the IBC BIM Contract Appendix to be used, insert that here.]*