



Environment Canada Environnement Canada

Assets, Contracting and Environmental Management  
Corporate Services Branch  
1040 Saint-Joseph Boulevard  
Gatineau, Quebec  
J8Z 1T3

September 3, 2013

**Solicitation number K2A51-13-0017**

**PROJECT TITLE: SITE INTEGRATED INVESTMENT PLAN UPDATE**

Dear Madam/Sir:

Environment Canada has a requirement for the services described in the attached "Terms of Reference". We are, as a result, soliciting proposals to perform this work.

If you are interested in providing these services, you must submit **three (3) copies of your technical proposal and two (2) copies of your completed signed Offer of Service** no later than **15:00 (local time) on October 18, 2013** to the following office:

**Environment Canada (BIDS)  
Mailroom  
171 Jean-Proulx  
Gatineau, Quebec  
J8Z 1W5**

in accordance with the following procedures:

1. Identify the solicitation number K2A51-13-0017 on the outside of all proposal/courier envelopes.
2. Include the following in your proposal, in sufficient detail for evaluation purposes:
  - (a) a brief statement indicating your understanding of the work;
  - (b) a summary of your related experience;
  - (c) a listing of staff (professional, technical, administrative, sub-contractors) who will be assigned to the work, and their respective personal résumés;

**(FORMER PUBLIC SERVANTS IN RECEIPT OF A GOVERNMENT PENSION  
MUST BE CLEARLY IDENTIFIED)**

- (d) an explanation of the intended approach and/or methodology; and
  - (e) contingency plans to be implemented in the event assigned staff become unavailable during the period of the contract.
3. Environment Canada requests that bidders provide their bid in separately bound sections as follows:

**SECTION I: SUBMIT THREE (3) HARD COPIES OF YOUR TECHNICAL PROPOSAL;**  
**SECTION II: SUBMIT TWO (2) SIGNED HARD COPIES OF THE OFFER OF SERVICE (WHICH REPRESENTS THE FINANCIAL BID).**

Prices must appear in the Offer of Service (Financial Bid) only. No prices must be indicated in any other section of the bid. Offer of Service must be signed.

Bids must be submitted only to Environment Canada's Mailroom by the date, time and place indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted to Environment Canada by facsimile or e-mail will not be accepted.

**All questions concerning this project shall be submitted in writing by e-mail: [Martha.Coady@ec.gc.ca](mailto:Martha.Coady@ec.gc.ca)**

Yours sincerely,

Martha Coady  
Procurement and Contracting Officer  
Materiel and Contract Management Branch

**Attachments:**

Offer of Service (to be completed, signed and submitted in **two (2) copies**)  
Mandatory Proposal Instructions  
Terms of Reference  
Evaluation Grid

## MANDATORY PROPOSAL INSTRUCTIONS

- 1. Receipt**

The specified office will receive the sealed proposals (including the Offer of Service) or revisions up until the time and date specified in the letter of invitation.

**Environment Canada shall no longer accept the Offer of Service/technical portion of the bidders' proposals by facsimile or by electronic mail.**
- 2. Unacceptable Proposals**

Proposals received after the closing date and time will not be considered **and will be returned unopened.**

Proposals **NOT** submitted with duly completed Offer of Service forms in the format specified by the Department will not be accepted.

Incomplete proposals will be considered non-responsive and rejected.

Any Offer of Service that exceeds the stated ceiling or maximum price, if any, shall be considered non-responsive and rejected.

Any Offer of Service not signed in accordance with the letter of invitation shall be considered non-responsive and rejected.
- 3. Acceptance**

The Department will not necessarily accept the lowest or any of the proposals submitted.
- 4. Completion**

The Offer of Service form must be completed and submitted in the format presented by the Department.

Proposals must be submitted in accordance with these instructions and those contained in the letter of invitation.

**It is the proposer's responsibility to ensure his/her complete understanding of the requirements and instructions specified by the Department. Enquiries concerning this solicitation must be submitted in writing to the contracting authority (Martha Coady) no later than five (5) working days prior to the bid closing date specified herein to allow sufficient time to provide a response.**
- 5. Reference**

The Department of Environment reserves the right, before awarding the Contract, to require the Contractor to submit such evidence of qualifications as it may deem necessary, and will consider evidence concerning the financial, technical and other qualifications and abilities of the contractor.



## OFFER OF SERVICE

1. **Offer submitted by:** (Print or type complete business or corporate name, address, telephone number, fax number)

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Tel. No. \_\_\_\_\_ Fax. No. \_\_\_\_\_

E-Mail \_\_\_\_\_

2. I (We), the undersigned, hereby offer to Her Majesty the Queen in Right of Canada, as represented by the Minister of Environment, to furnish all necessary expertise, supervision, materials, equipment and other things necessary to complete, to the entire satisfaction of the Minister or his/her authorized representative, the work as described in the Solicitation package according to the terms and conditions of the Department's service contract for the following prices:



**2.1 Professional Services:**

The following is a breakdown of the Professional Services (show fee structure all-inclusive of profit and overhead).

<u>Category of Personnel</u>	<u>Per Diem Rates</u>	<u>Number of Days Assigned</u>	<u>Total</u>
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**2.2 Administrative Expenses:**

(Courier, long distance calls, reproduction, etc.).

\$ \_\_\_\_\_

**2.3 Travel Expenses:**

Reimbursable at cost in accordance with the attached Travel Directive, to a financial limitation of

\$ \_\_\_\_\_

My/Our estimate for travel expenses is based upon the following anticipated travel requirements:

**2.4 TOTAL PROPOSAL PRICE  
(Canadian Currency)**

\$ \_\_\_\_\_  
(Total of 2.1 + 2.2 + 2.3 above)

+ G.S.T. \$ \_\_\_\_\_

TOTAL: \$ \_\_\_\_\_



3. I (We) agree that the Offer of Service will remain firm for a period of one hundred and twenty (120) calendar days after the tender closing date.
4. Payment for professional services and associated costs will be effected upon completion of each phase, submission of invoices detailing the work completed to date and upon confirmation by the departmental representative of the services rendered/deliverables received.

Claims for travel and accommodation expenses will be reimbursed at cost, in accordance with the Travel Directive, after they have been submitted with the aforementioned invoices and supported by receipts, vouchers, or other appropriate documents.

5. I (We) agree to submit herewith the following:
  - (a) a PROPOSAL to undertake the work, indicating an understanding of the objectives and responsibilities, a methodology and a time schedule as it relates to the requirements;
  - (b) a CORPORATE RESUME indicating relevant experience, the proposed personnel for the work team including their curriculum vitae;
  - (c) a list, if applicable, of SUBCONTRACTOR(S) including full names and addresses, portion(s) of work to be subcontracted and relevant firm experience;
  - (d) a duly completed OFFER OF SERVICE, **in two copies (2)**.
6. It is a condition that during the term of the contract all persons engaged in the course of carrying out this contract shall conduct themselves in compliance with the principles of the Conflict of Interest and Post-Employment Code for Public Office Holders. Should an interest be acquired or seem to cause a departure from the principles, the contractor shall declare it immediately to the departmental representative.

**OFFERS WHICH DO NOT CONTAIN THE ABOVE-MENTIONED DOCUMENTATION OR DEVIATE FROM THE PRESCRIBED COSTING FORMAT SHALL BE CONSIDERED INCOMPLETE AND NON-RESPONSIVE AND SHALL BE REJECTED.**

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 2013, at \_\_\_\_\_

in the province of \_\_\_\_\_

\_\_\_\_\_  
by: (Signing Officer) Print & Sign

\_\_\_\_\_  
Title

**Terms of Reference - (K2A51-13-0017)**

**Completion of One Site-specific Integrated Investment Plan**

The work to be done under this Contract is described in detail on the Statement of Work, attached as Appendix A to these Terms of Reference.

All other conditions applicable to this Contract are described in detail under Applicable Conditions, attached as Appendix B to these Terms of Reference.



## APPENDIX A – K1A51-13-0017

### **STATEMENT OF WORK:**

#### **Purpose:**

Environment Canada has a requirement for professional services. The contractor is required to go to one National Wildlife Area location to update and/or complete Site-specific Integrated Investment Plan (Site IIP).

#### **Background**

The Site IIP is a collection of information detailing the lifecycle management of various building systems and components to inform the present condition of a property's physical asset base. This information is used to support the calculation of the Facility Condition Index (FCI) that is used to guide strategic investment of capital funds for the property's assets, over the short, medium and long-term. Once established, it is best practice at Environment Canada to ensure Site IIPs are updated on an annual basis.

#### **Scope:**

Validate and document physical asset information to support strategic investment and efficient management of real property owned by Environment Canada.

#### **Objectives:**

Collect information detailing the lifecycle management of the building system and components to characterize the state of system and components at the National Wildlife Area. Information such as the age, service life, replacement cost and investment requirements will have to be recorded based on knowledge, experience, and industry standard practices (e.g. to establish replacement cost).

#### **Statement of Work:**

The consultant will go on site and gather detailed information to update and/or complete Site IIP, containing a space utilization table, several inventory tables (building system, site infrastructure and support equipment) and costing information requirements. The site is the National Wildlife Area located at Last Mountain Lake (Saskatchewan)

#### **Project Description and Deliverables:**

The consultant will follow these steps to fulfill the contract requirements:

- 1- Prepare inventory of the buildings systems and components
- 2- Review resources provided which may include; recent Building Condition Reports; As-built drawings; other facility related documents.
- 3- Conduct on-site research to determine actual status of the components and record key information to complete the Excel template (such as age, service life, replacement cost)
- 4- Establish replacement costs based on industry standard practices (such as RS Means)

5- Enter all data and validate formulas in the Excel template provide by the contract authority.

Site IIP will need to be updated and/or completed using a template (Microsoft Excel format) provided by Environment Canada. A sample template is joined with these terms of reference.

One Site IIP, Last Mountain Lake National Wildlife Area (Saskatchewan) should be done.

No presentation of the results is required. The final version will be provided by the consultant to Environment Canada using email.

Final version of the Site IIP shall be submitted to the Project Authority no later than 2014.01.30.

### **Intellectual Property**

The Crown has determined that any intellectual property arising from the performance of the Work under the Contract will vest in Canada where the main purpose of the deliverables contracted for, is to generate knowledge and information for public dissemination.

## **APPENDIX B – K1A51-13-0017**

### **APPLICABLE CONDITIONS**

#### **1. VALUE OF THE CONTRACT**

##### **Milestone Payment**

100% of the total professional fees will be paid following acceptance of the final Site IIP.

##### **Project Cost**

- Environment Canada has established funding for this project at a maximum amount of \$35,000.00 excluding GST

This covers the period from date of award to January 30, 2014.

#### **2. CONTENT OF THE PROPOSAL**

##### **Submission of Proposals:**

The proposal should describe in sufficient detail the technical qualifications and relevant experience of the contractor and key professional staff and sources of reference data/information.

The proposal should include technical, cost and company expertise components which respond to the following requirements:

##### **1. Technical and expertise Component**

The proposal must include a statement of understanding, not to exceed three pages in length, of the work to be undertaken and why it has been requested. The proposal must present a work plan and describe how the contractor would carry out the tasks to achieve the project objectives.

The contractor shall include with the proposal the methodology that will be used to audit and fill the Site-specific Integrated Investment Plan (Site IIP) template.

The proposal must identify:

- The professional staff to be assigned to the project and their expected contribution to the project,
- Staff experience directly relevant to the work,
- Relevant company experience directly related to the work (for prime and sub-contractors)

##### **2. Cost Component**

The cost quotation must identify the level of effort and estimated cost for each task in the work plan, the estimated cost of professional and support personnel, materials, equipment communications and supplies.

The total cost of this project shall not exceed \$35,000.00 (GST is excluded).

### 3. EVALUATION OF THE PROPOSAL

#### Proposal Evaluation Criteria

The Bidder with the highest combined rating for technical/company expertise (65%) and price (35%) will be recommended for award of the contract. The combined rating (i.e. total points) will be determined using Equation 1 defined in the annex B. If no acceptable bids are received, Environment Canada has the right to not award this contract.

The proposal must include a detailed description of the methodology and the workplan describing how the Contractor would carry out the study to achieve the above objectives. Any relevant information to enable Environment Canada to adequately score the proposal based on the criteria listed below must be included.

	Mandatory Criteria	Met/Not Met
M1	The Bidder must provide a list of all qualified individual resources who will participate in the project and the role and responsibilities of each team member (include a description of a back up strategy in case identified resources are not available).	
M2	The Bidder must assign to the project at least one resource who is a certified Professional Engineer (P.Eng.), or has equivalent experience and/or training, in the relevant Canadian province(s) and/or territory (ies).	
M3	The Bidder must demonstrate that they have successfully prepared at least one (1) relevant building management plan or facility life-cycle management plan or site-specific integrated investment plan in a complex of office buildings and or laboratories which: <ul style="list-style-type: none"> <li>a) involved the itemization of building systems and components, including key life-cycle criteria such as; in service date; life expectancy; replacement cost, etc.</li> <li>b) resulted in the ability to calculate the Facility Condition Index (FCI) according to industry standard.</li> </ul>	
M4	The Bidder must provide a work plan that demonstrates how it will provide services as described in the Project Description and Deliverables of the Terms of Reference.	
M5	The Bidder must provide documentary evidence to demonstrate compliance with the <i>Code of Conduct for Procurement</i> , established by Public Works and Government Services Canada; and must agree that its terms are incorporated as part of any agreement entered into for the work included in this project.	

	<b>Rated Criteria</b>
<p><b><u>1. Experience facilitating energy performance contracts in a complex of office buildings</u></b></p> <p>The Bidder should describe experience with at least one building management plan or facility life-cycle management plan or site-specific integrated investment plan project in a complex of office buildings which involved the itemization of building systems and components, including key life-cycle criteria such as; in service date; life expectancy; replacement cost, etc.</p> <p>The description should include details providing an overview of the project, a description of steps implemented, a description of the complete list of services provided, and other details (e.g. advice and option provide to the client) that help demonstrate the Bidder's ability to provide professional services to clients in the area of building management plan or facility life-cycle management plan or site-specific integrated investment plan in a complex of office buildings. Indication of the level of effort for each step of the services provided.</p> <p>The description of the experience should not exceed three (3) pages. EC reserves the right to disregard any portion exceeding the third page.</p>	<p><b>40-50 points:</b></p> <p>The Bidder provides a complete and detailed description of an experience with at least one building management plan or facility life-cycle management plan or site-specific integrated investment plan in a complex of office buildings which involved the itemization of building systems and components, including key life-cycle criteria such as; in service date; life expectancy; replacement cost, etc.</p> <p>The project example provided in the proposal clearly demonstrates that the Bidder has relevant experience related to the project requirements and its scope of work.</p> <p>The description provides sufficient details to get a clear understanding and a clear overview of the project example. The description is clear and fully describes the scope of services provided by the Bidder.</p> <p>The scope of services provided by the Bidder for the project example is comprehensive, and includes professional services on most or all aspects of the Project Description and Deliverables of the Terms of Reference.</p> <p><b>20-39 points:</b></p> <p>The Bidder provides a good and mostly complete description of an experience with at least one building management plan or facility life-cycle management plan or site-specific integrated investment plan project in a complex of office buildings which involved the itemization of building systems and components, including key life-cycle criteria such as; in service date; life expectancy; replacement cost, etc.</p> <p>The project example provided in the proposal clearly demonstrates that the Bidder has some experience related to the project requirements and its scope of work.</p> <p>The description provides sufficient details to get a good understanding and a good overview of the project example; however, some information is incomplete and/or lack clarity. The descriptions may not fully describe the scope of services provided by the Bidder.</p> <p>The scope of services provided by the Bidder for the project example is sufficient, but only includes professional services on a limited number of aspects of the Project Description and Deliverables of the Terms of Reference.</p> <p><b>0-19 points:</b></p> <p>The Bidder provides a brief or no description of an experience with at least one building management plan or facility life-cycle management plan or site-specific integrated investment plan project in a complex of office buildings which involved the itemization of building systems and components, including key life-cycle criteria such as; in service date; life expectancy; replacement cost, etc.</p>

	<p>The project example provided in the proposal demonstrates that the Bidder has a limited or no experience related to the project requirements and its scope of work.</p> <p>The description provides insufficient details to get a good understanding and a good overview of the project example. The description poorly or does not describes the scope of services provided by the Bidder.</p> <p>The scope of services provided by the Bidder for the project example is insufficient. The facilitation services are limited to some aspects of the Project Description and Deliverables of the Terms of Reference.</p>
<p><b>2.</b> The Bidder should provide a work plan that demonstrates how it will provide services as described in the Scope of Work of the Terms of Reference. The following milestones should be included in the work plan:</p> <p>1-Prepare inventory of the buildings systems and components  2-Review resources provided which may include; recent Building Condition Reports; As-built drawings; other facility related documents.  3-Conduct on-site research to determine actual status of the components and record key information to complete the Excel template (such as age, service life, replacement cost)  4-Establish replacement costs based on industry standard practices (such as RS Means)  5-Enter all data and validate formulas in the Excel template provide by the contract authority.</p> <p>The work plan should outline the specific tasks to be performed to reach each milestone including identifying deliverables along with expected completion dates. The following details should be included: proposed project schedule, roles and responsibilities of each individual resource that will be part of the project, and objectives and outputs for both the contractor and the project authority. Indication of the level of</p>	<p><b>40-50 points:</b></p> <p>The Bidder provides a complete and detailed work plan that demonstrates how it will provide services as described in the Scope of Work of the Terms of Reference.</p> <p>The work plan provided in the proposal clearly addresses reaching each of the following milestones:</p> <p>1-Prepare inventory of the buildings systems and components  2-Review resources provided which may include; recent Building Condition Reports; As-built drawings; other facility related documents.  3-Conduct on-site research to determine actual status of the components and record key information to complete the Excel template (such as age, service life, replacement cost)  4-Establish replacement costs based on industry standard practices (such as RS Means)  5-Enter all data and validate formulas in the Excel template provide by the contract authority.</p> <p>The information provides sufficient details to get a clear understanding of the proposed work plan. It is clear that the Bidder tailored the work plan specifically for this project.</p> <p>The work plan is comprehensive and clearly outlines the specific tasks to be performed for reaching each milestone including identifying deliverables along with expected completion dates. The following details are included: proposed project schedule, roles and responsibilities of each individual resource that will be part of the project, and objectives and outputs for both the contractor and the project authority. Indication of the level of effort for each step of the work plan.</p> <p><b>20-39 points:</b></p> <p>The Bidder provides a good and mostly complete work plan that demonstrates how it will provide services as described in the Scope of Work of the Terms of Reference.</p> <p>The work plan provided in the proposal addresses reaching all or some of the following milestones:  1-Prepare inventory of the buildings systems and</p>

effort for each step of the work plan is also required

The work plan should not exceed three (3) pages. EC reserves the right to disregard any portion exceeding the third page.

components

2-Review resources provided which may include; recent Building Condition Reports; As-built drawings; other facility related documents.

3-Conduct on-site research to determine actual status of the components and record key information to complete the Excel template (such as age, service life, replacement cost)

4-Establish replacement costs based on industry standard practices (such as RS Means)

5-Enter all data and validate formulas in the Excel template provide by the contract authority.

The information provides details to get a good understanding of the proposed work plan; however, some information is incomplete and/or lack clarity. It is unclear that the Bidder tailored the work plan specifically for this project.

The work plan outlines the tasks to be performed for reaching each or most milestones. Most of the following details may be included: identifying deliverables along with expected completion dates, proposed project schedule, roles and responsibilities of each individual resource that will be part of the project, and objectives and outputs for both the contractor and the project authority. Indication of the level of effort for most steps of the workplan.

**0-19 points:**

The Bidder provides a brief or no work plan that demonstrates how it will provide services as described in the Scope of Work of the Terms of Reference. The work plan provided in the proposal briefly or does not address reaching the following milestones:

1-Prepare inventory of the buildings systems and components

2-Review resources provided which may include; recent Building Condition Reports; As-built drawings; other facility related documents.

3-Conduct on-site research to determine actual status of the components and record key information to complete the Excel template (such as age, service life, replacement cost)

4-Establish replacement costs based on industry standard practices (such as RS Means)

5-Enter all data and validate formulas in the Excel template provide by the contract authority.

The information provides insufficient details to get a good understanding of the proposed work plan. The information is mostly incomplete and/or lack clarity. It is unclear that the Bidder tailored the work plan specifically for this project.

The work plan briefly or does not outline the tasks to be performed for reaching the milestones. The following details are limited or missing: identifying deliverables along with expected completion dates, proposed project schedule, roles and responsibilities of each individual resource that will be part of the project, and objectives and outputs for

	both the contractor and the project authority. No Indication of the level of effort for the steps of the work plan.
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#### 4. METHOD OF SELECTION

##### Selection Method

##### Technical and Experience Rating

The proposal that obtained the highest score for the technical and experience evaluation, as presented in appendix A, will be assigned a weight of 60%. All other proposals that meet the minimum score requirements for the technical evaluation will be prorated.

##### Cost Rating

The proposal presenting the lowest cost while meeting the minimum score requirements for the technical evaluation will be assigned a weight of 30%. All other proposals that meet the minimum score requirements for the technical evaluation will be prorated.

Both the technical rating and the cost rating will be used to determine the final score, as illustrated by the example below:

##### Equation 1:

$$Total\ Points = \frac{Bidder's\ Rated\ Score}{Highest\ Bidder's\ Rated\ Score} \times 65 + \frac{Lowest\ Bidder\ Price}{Bidder's\ Price} \times 35$$

##### Example:

Bidder	Bidder's Rated Score	Bidder's Price	Points for Technical/ Management Components	Points for Price	Total Points
Bidder A	80	\$30,000	$(80 \div 90) \times 65 = 57.8$	$(30,000 \div 30,000) \times 35 = 35$	$57.8 + 35 = 92.8$
Bidder B	85	\$40,000	$(85 \div 90) \times 65 = 61.4$	$(30,000 \div 40,000) \times 35 = 26.3$	$61.4 + 26.3 = 87.7$
Bidder C	90	\$35,000	$(90 \div 90) \times 65 = 65$	$(30,000 \div 35,000) \times 35 = 30$	$65 + 30 = 95^*$

\*In this example, Bidder C will be recommended for award of the contract.

In the event of a tie, the proposal receiving the highest score for the technical evaluation will be selected.