

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:

Bid Receiving - PWGSC / Réception des soumissions - TPSGC

11 Laurier St. / 11 rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau, Québec K1A 0S5

Bid Fax: (819) 997-9776

Request For a Standing Offer Demande d'offre à commandes

Departmental Individual Standing Offer (DISO)

Offre à commandes individuelle du département(OCID)

Canada, as represented by the Minister of Public Works and Government Services Canada, hereby requests a Standing Offer on behalf of the Identified Users herein.

Le Canada, représenté par le ministre des Travaux Publics et Services Gouvernementaux Canada, autorise par la présente, une offre à commandes au nom des utilisateurs identifiés énumérés ci-après.

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Consultant Services Division/Division des services
d'experts-conseils

11 Laurier St./11 Rue Laurier

3C2, Place du Portage

Phase III

Gatineau, Québec K1A 0S5

Title - Sujet Full Service Interior Design S.O.	
Solicitation No. - N° de l'invitation EN448-152437/A	Date 2015-06-05
Client Reference No. - N° de référence du client 20152437	GETS Ref. No. - N° de réf. de SEAG PW-\$\$FE-176-67450
File No. - N° de dossier fe176.EN448-152437	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2015-07-21	Time Zone Fuseau horaire Eastern Daylight Saving Time EDT
Delivery Required - Livraison exigée See Herein	
Address Enquiries to: - Adresser toutes questions à: Talorn, Mike	Buyer Id - Id de l'acheteur fe176
Telephone No. - N° de téléphone (819)956-3796 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Various locations, National Capital Area	
Security - Sécurité This request for a Standing Offer does not include provisions for security. Cette Demande d'offre à commandes ne comprend pas des dispositions en matière de sécurité.	

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

Solicitation No. - N° de l'invitation

EN448-152437/A

Amd. No. - N° de la modif.

File No. - N° du dossier

fe176EN448-152437

Buyer ID - Id de l'acheteur

fe176

Client Ref. No. - N° de réf. du client

20152437

CCC No./N° CCC - FMS No/ N° VME

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SUPPLEMENTARY INSTRUCTIONS TO PROPONENTS (SI)

SI 1 SECURITY REQUIREMENTS

Proponents are hereby informed that there is a strong possibility that some call-ups against the Standing Offers might require that the consultants and their personnel possesses a Facility Security Clearance (FSC) at the SECRET level issued by the Canadian Industrial Security Directorate (CISD) of Public Works and Government Services Canada (PWGSC).

Should the successful proponents not have the level of security indicated above, PWGSC shall sponsor the successful proponents so CISD can initiate procedures for security clearance. CISD, by letter, shall forward documentation to the successful proponents for completion.

Proponents desiring such sponsorship should so indicate in their covering letter with their proposal.

Successful proponent(s) issued a standing offer as a result of this RFSO, not possessing the required security clearance at time of call up, will be bypassed and PWGSC will proceed to the next consultant who possesses the required security clearance and it is furthest away from the ideal business distribution. Refer to the Standing Offer Particulars for information regarding ideal business distribution.

SI 2 INTEGRITY PROVISIONS - ASSOCIATED INFORMATION

By submitting a proposal, the Proponent certifies that the Proponent and his Affiliates are in compliance with the provisions as stated in the Integrity Provisions clause of the General Instructions to Proponents. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

SI 3 FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

By submitting a proposal, the Proponent certifies that the Proponent, and any of the Proponent's members if the Proponent is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from Employment and Social Development Canada (ESDC)-Labour's website.

Canada will have the right to declare a proposal non-responsive, or to set-aside a Standing Offer, if the Proponent, or any member of the Proponent if the Proponent is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of issuing of a Standing Offer or during the period of the Standing Offer.

Canada will also have the right to terminate the Call-up for default if a Consultant, or any member of the Consultant if the Consultant is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list during the period of the contract.

The Proponent must provide the Contracting Authority with a completed Federal Contractors Program for Employment Equity - Certification (see Appendix A - Declaration/Certifications Form), before the issuance of a Standing Offer. If the Proponent is a Joint Venture, the Proponent must provide the Contracting Authority with a completed Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

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GENERAL INSTRUCTIONS TO PROPONENTS

Integrity Provisions - Proposal

1. Proponents must comply with the Code of Conduct for Procurement (<http://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/contexte-context-eng.html>). In addition, proponents must respond to Requests for Standing Offers (RFSO) in an honest, fair and comprehensive manner, accurately reflect their capacity to satisfy the requirements stipulated in the RFSO, Standing Offer (SO) and any resulting contracts, and submit proposals as well as enter into contracts only if they will fulfill all obligations of the contract.
2. By submitting an offer, proponents confirm that they understand that, to ensure fairness, openness and transparency in the procurement process, the commission of certain acts or offences will render them ineligible to be issued a Standing Offer and awarded a contract. Canada will declare non-responsive any proposal in respect of which the information requested is missing or inaccurate, or in respect of which the information contained in the certifications is found by Canada to be untrue in any respect, at the time of issuance of the Standing Offer (SO) by Canada. If it is determined, after issuance of the SO, that the Proponent made a false declaration, Canada will, following a notice period, have the right to set aside the SO and to terminate for default any resulting contracts. The Proponent will be required to diligently maintain up-to-date the information requested. The Proponent and any of the Proponent's Affiliates, will also be required to remain free and clear of any acts or convictions and any conditional or absolute discharges specified in these Integrity Provisions during the period of any SO arising from this RFSO and any resulting call-ups.
3. **Affiliates**
For the purpose of these Integrity Provisions, everyone, including but not limited to organizations, bodies corporate, societies, companies, firms, partnerships, associations of persons, parent companies and subsidiaries, whether partly or wholly-owned, as well as individuals and directors, are Proponent's Affiliates if:
 - a. directly or indirectly either one controls or has the power to control the other, or
 - b. a third party has the power to control both.

Indicia of control, include, but are not limited to, interlocking management or ownership, identity of interests among family members, shared facilities and equipment, common use of employees, or a business entity created following the acts or convictions and any conditional or absolute discharges specified in these Integrity Provisions which has the same or similar management, ownership, or principal employees, as the case may be.

4. Proponents who are incorporated, including those submitting proposals as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Proponent. Proponents submitting proposals as sole proprietorship, including those submitting proposals as a joint venture, must provide the name of the owner. Proponents submitting proposals as societies, firms, or partnerships do not need to provide lists of names.

If the required names have not been received by the time the evaluation of proposals is completed, Canada will inform the Proponent of a time frame within which to provide the information. Failure to provide the names within the time frame specified will render the proposal non-responsive. Providing the required names is a mandatory requirement for a Standing Offer to be issued.

Canada may, at any time, request that the Proponent provide properly completed and signed consent forms (Consent to a Criminal Record Verification form - PWGSC-TPSGC 229) for any or all individuals mentioned above within a specified time frame. Failure to provide such consent

forms and associated information within the time frame provided, or failure to cooperate to the verification process will result in the proposal being declared non-responsive.

5. The Proponent must diligently inform Canada in writing of any changes affecting the list of names of directors during this procurement process as well as during the period of any Standing Offer arising from this RFSO and any resulting call-ups. The Proponent must also, when requested, provide Canada with properly completed and signed consent forms.
6. By submitting a proposal, the Proponent certifies that it is aware, and that its affiliates are aware, that Canada may request additional information, certifications, consent forms and other evidentiary elements proving identity or eligibility. Canada may also verify the information provided by the Proponent, including the information relating to the acts or convictions and any conditional or absolute discharges specified in these Integrity Provisions, through independent research, use of any government resources or by contacting third parties.
7. By submitting a proposal, the Proponent certifies that neither the Proponent nor any of the Proponent's Affiliates have directly or indirectly, paid or agreed to pay, and will not, directly or indirectly, pay a contingency fee to any individual for the solicitation, negotiation or obtaining of the Standing Offer and any resulting call-ups if the payment of the fee would require the individual to file a return under section 5 of the Lobbying Act.
8. Time Period

The Time Period is 10 years and is measured from the date of the conviction or from the date of the conditional or absolute discharge.

In addition, for a conviction under paragraphs a. or b. of subsection 9, following the 10-year period, a pardon or a record suspension must have been obtained, or capacities must have been restored by the Governor in Council. The Proponent must therefore provide with its bid or promptly afterwards a copy of confirming documentation from an official source for its certification to be found true by Canada for the purpose of these Integrity Provisions. If the documentation has not been received by the time the evaluation of bids is completed, Canada will inform the Proponent of a time frame within which to provide the information. Failure to comply within the time frame specified will render the bid non-responsive.

9. By submitting a proposal, the Proponent certifies that neither the Proponent nor any of the Proponent's Affiliates have been convicted of an offence or received a conditional or an absolute discharge under any of the following provisions, unless the time period, as defined in the Time Period subsection, has elapsed:
 - a. paragraph 80(1)(d) (*False entry, certificate or return*), subsection 80(2) (*Fraud against Her Majesty*) or section 154.01 (*Fraud against Her Majesty*) of the *Financial Administration Act*, or
 - b. section 121 (*Frauds on the government and Contractor subscribing to election fund*), section 124 (*Selling or Purchasing Office*), section 380 (*Fraud*) for fraud committed against Her Majesty or section 418 (*Selling defective stores to Her Majesty*) of the *Criminal Code*, or
 - c. section 119 (*Bribery of judicial officers, etc.*), section 120 (*Bribery of officers*), section 346 (*Extortion*), sections 366 to 368 (*Forgery and other offences resembling forgery*), section 382 (*Fraudulent manipulation of stock exchange transactions*), section 382.1 (*Prohibited insider trading*), section 397 (*Falsification of books and documents*), section 422 (*Criminal breach of contract*), section 426 (*Secret commissions*), section 462.31 (*Laundering proceeds of crime*) or sections 467.11 to 467.13 (*Participation in activities of criminal organization*) of the *Criminal Code*, or
 - d. section 45 (*Conspiracies, agreements or arrangements between competitors*), section 46 (*Foreign directives*), section 47 (*Bid rigging*), section 49 (*Agreements or arrangements of*

- federal financial institutions), section 52 (False or misleading representation), section 53 (Deceptive notice of winning a prize) of the Competition Act, or*
- e. *section 239 (False or deceptive statements) of the Income Tax Act, or*
 - f. *section 327 (False or deceptive statements) of the Excise Tax Act, or*
 - g. *section 3 (Bribing a foreign public official), section 4 (Accounting), or section 5 (Offence committed outside Canada) of the Corruption of Foreign Public Officials Act, or*
 - h. *section 5 (Trafficking in substance), section 6 (Importing and exporting), or section 7 (Production of substance) of the Controlled Drugs and Substance Act.*

The Proponent also certifies that no one convicted under any of the provisions under a. or b. are to receive any benefit under a Standing Offer arising from this Request for Standing Offers and any resulting call-ups, unless a pardon or a record suspension has been obtained or capacities restored by the Governor in Council, as defined in the Time Period subsection.

10. Foreign Offences

The Proponent also certifies that, within a period, as defined in the Time Period subsection, neither the Proponent nor any of the Proponent's Affiliates have been convicted of or have received a conditional or an absolute discharge, under any foreign offence that Canada deems to be of similar constitutive elements to the offences listed in these Integrity Provisions. Canada will also consider foreign measures declared by Canada to be similar in nature to the Canadian pardon, record suspension, or restoration of capacities by the Governor in Council.

11. Sub-consultants

The Proponent must ensure that subcontracts include Integrity Provisions no less favourable to Canada than those imposed in the resulting contract.

12. Preventive Measures associated with the Time Period

In cases where the period (as defined in the Time Period subsection), for a conviction, or a conditional or an absolute discharge of the Proponent or any of the Proponent's Affiliates has elapsed, then the Proponent must also certify for itself and for its Affiliates that measures have been diligently put in place in order to avoid the reoccurrence of such convictions and any conditional or absolute discharges or reprehensible actions.

13. Public Interest Exception

Proponents understand that Canada may issue a Standing Offer with a proponent where the Proponent or the Proponent's Affiliates have been convicted of or have received a conditional or an absolute discharge for an offence specified in these Integrity Provisions, when required to do so by law or legal proceedings, or when Canada in its sole discretion considers it necessary to the public interest for reasons which include, but are not limited to:

- o no one else is capable of performing the contract;
- o emergency;
- o national security;
- o health and safety;
- o economic harm.

If all proposals are found non-responsive for reason of a listed relevant conviction or act, then Canada may invoke the public interest exception, as described in the paragraph above. In such cases, only proposals containing a declaration concerning a relevant offence or act will be further considered. Canada may also elect to procure outside of the present process. In all cases,

Canada reserves the right to impose additional conditions or measures to ensure the integrity of the procurement process.

14. Non-application

For governments, as well as entities controlled by a government, including Crown corporations, the present Integrity Provisions are reduced to complying with article 750 of the *Criminal Code*, the Government Contract Regulations and the *Code of Conduct for Procurement*.

GI 1 INTRODUCTION

1. Public Works and Government Services Canada (PWGSC) is inviting consulting firms with architecture/interior design expertise to submit proposals for Standing Offers. The selected consultants shall provide a range of services as identified in the Required Services section of this document for building projects in the National Capital Area.
2. Proponents shall be licensed or eligible to be licensed to practise in the province of Quebec and Ontario. If a Proponent is licensed to practise in only one of the two provinces, then that Proponent must be eligible and willing to be licensed in the province in which they are not licensed. Firms should be able to demonstrate successful delivery of these services for a broad variety of projects over the last five (5) years. In general, the firm and its personnel will be evaluated on the basis of their demonstrated understanding of the scope of services, their approach and methodology to providing those services, the quality of their relevant experience in this area, as well as the cost of the provision of the services.
3. It is PWGSC's intention to authorize up to five (5) Standing Offers, each for a period of three (3) years from the date of issuing the Standing Offers, plus one irrevocable option for the Crown to extend length by a period of one (1) year. The total dollar value of all Standing Offers is estimated to be \$6,000,000.00 (Applicable Taxes included). Individual call-ups will vary, up to a maximum of \$1,000,000.00 (Applicable Taxes included). Proponents should note that there is no guarantee that the full or any amount of the Standing Offers will be called-up; PWGSC will issue call-ups only when the specific services to be provided under the Standing Offer are needed. Please refer to Section SP5, CALL-UP PROCEDURE.
4. This procurement is subject to the provisions of the North American Free Trade Agreement (NAFTA), World Trade Organization - Agreement on Government Procurement (WTO-AGP), Canada Free Trade Agreements with Peru/Colombia/Panama.

GI 2 PROCUREMENT BUSINESS NUMBER

Proponents are required to have a Procurement Business Number (PBN) before issuance of a standing offer. Proponents may register for a PBN on line at Supplier Registration Information (<https://srisupplier.contractsCanada.gc.ca/>). For non-Internet registration, proponents may contact the InfoLine at 1-800-811-1148 to obtain the telephone number of the nearest Supplier Registration Agent.

GI 3 CONTRACTING AUTHORITY

1. The Contracting Authority for this Request for Standing Offer is:

Public Works and Government Services Canada
Real Property Contracting Directorate

3C2, Phase III, Place du Portage
Gatineau, Quebec
K1A 0S5

2. The Contracting Authority is responsible for the establishment of the Standing Offer, its administration, and any contractual issues relating to individual call-ups.

GI 4 DEPARTMENTAL REPRESENTATIVE

1. A Departmental Representative will be identified at time of each individual Call-Up.
2. The Departmental Representative will be responsible for all matters concerning the technical content of the work under the Call-Up.

GI 5 QUANTITY

The level of services and estimated expenditure specified in the Request for Standing Offer are only an approximation of requirements given in good faith. The making of a proposal by the Proponent shall not constitute an agreement by Canada. Canada may make one or several call-ups against a standing offer.

GI 6 PWGSC OBLIGATION

A Request for Standing Offer does not commit PWGSC to authorize the utilization of a standing offer or to pay any cost incurred in the submission of proposals, or cost incurred in making necessary studies for the preparation thereof, or to procure or contract for any services. PWGSC reserves the right to reject or authorize for utilization any proposal in whole or in part, with or without further discussion or negotiation. Canada reserves the right to cancel or amend the Request for Standing Offer at any time.

GI 7 RESPONSIVE PROPOSALS

To be considered responsive, a proposal must meet all of the mandatory requirements set out in the Request for Standing Offer. No further consideration in the selection procedure will be given to a Proponent submitting a non-responsive proposal. Proponents that submitted non-responsive proposals are notified accordingly.

GI 8 COMMUNICATIONS - SOLICITATION PERIOD

1. Questions or requests for clarification during the solicitation period must be submitted in writing to the Contracting Authority named on the Request for Standing Offer - Page 1 as early as possible. **Enquiries should be received no later than ten (10) working days prior to the closing date identified on the front page of the Request for Standing Offer** Enquiries received after that time may not be answered.
2. To ensure the integrity of the competitive bid process, enquiries and other communications regarding the RFSO must be directed only to the Contracting Authority identified in the RFSO. Failure to comply with this requirement may result in the proposal being declared non-responsive.
3. To ensure consistency and quality of information provided to proponents, significant enquiries received and their replies will be posted on the Government Electronic Tendering Service (GETS).

GI 9 OVERVIEW OF SELECTION PROCESS

1. The Standing Offer selection process is as follows:

- a) a Request for Standing Offer is obtained by proponents through the GETS;
- b) in response to the Request for Standing Offer, interested proponents shall submit their proposals using a "two-envelope" procedure, in which proponents submit the "technical" component of their proposal in one envelope and the proposed price of the services (price proposal) in a second envelope as further described in GI 10.3 below;
- c) responsive proposals are reviewed, evaluated and rated by a PWGSC Evaluation Board in accordance with the criteria, components and weight factors set out in the Request for Standing Offer;
- d) PWGSC may issue a standing offer to the successful proponents;
- e) Proponents are notified of the results within one week after PWGSC has entered into a standing offer arrangement with the successful proponents.

GI 10 SUBMISSION OF PROPOSAL

- 1. Canada requires that each proposal, at closing date and time or upon request from the Contracting Authority, be signed by the Proponent or by an authorized representative of the Proponent. If a proposal is submitted by a joint venture, it must be in accordance with section GI18.
- 2. It is the Proponent's responsibility to:
 - a) obtain clarification of the requirements contained in the Request for Standing Offer, if necessary, before submitting a proposal;
 - b) submit an original of the proposal plus the specified number of copies, duly completed, IN THE FORMAT REQUESTED, on or before the closing date and time set for receipt of proposals;
 - c) send its proposal only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit specified on page 1 of the Request for Standing Offer or to the address specified in the Request for Standing Offer;
 - d) ensure that the Proponent's name, return address, the solicitation number and description, and solicitation closing date and time are clearly visible on the envelope or the parcel(s) containing the proposal; and
 - e) provide a comprehensive and sufficiently detailed proposal that will permit a complete evaluation in accordance with the criteria set out in the Request for Standing Offer.
- 3. The technical and price components of the proposal must be submitted in separate, easily identified envelopes in accordance with the instructions contained in the proposal document. Both envelopes shall be submitted as one package which shall clearly and conspicuously display and indicate on the outside of the package the information identified in paragraph 2. d) above.
- 4. Timely and correct delivery of proposals to the office designated for receipt of proposals is the sole responsibility of the Proponent. Public Works and Government Services Canada will not assume or have transferred to it those responsibilities. All risks and consequences of incorrect delivery of proposals are the responsibility of the Proponent.

5. The evaluation of proposals may result in authorization to utilize one or more Standing Offers in whole or in part, taking into consideration the evaluation criteria and selection method stated herein. The lowest or any proposal will not necessarily be authorized. In case of error in the calculation of prices, the unit prices will govern.
6. The proposal should completely and thoroughly address each element of the requirements as enumerated in the Request for Standing Offer. It is also essential that the elements contained in the proposal be stated in a clear and concise manner.
7. Proposal documents and supporting information may be submitted in either English or French.
8. Canada will make available Notices of Proposed Procurement (NPP), RFSOs and related documents for download through the Government Electronic Tendering Service (GETS). Canada is not responsible and will not assume any liabilities whatsoever for the information found on websites of third parties. In the event an NPP, RFSO or related documentation would be amended, Canada will not be sending notifications. Canada will post all amendments using GETS. It is the sole responsibility of the Proponent to regularly consult GETS for the most up-to-date information. Canada will not be liable for any oversight on the Proponent's part nor for notification services offered by a third party.

GI 11 NON-ACCEPTANCE OF ELECTRONICALLY TRANSMITTED PROPOSALS

Due to the nature of this solicitation, a complete technical proposal, as well as a cost of services proposal (submitted under separate cover), with supporting information is required to allow a proper evaluation to be conducted. Electronic transmission of the proposal by such means as electronic mail or facsimile is not considered to be practical, and therefore, will not be accepted.

GI 12 EVALUATION OF PRICE

The price proposal must be submitted in Canadian dollars and will be evaluated excluding Applicable Taxes.

GI 13 LIMITATION OF SUBMISSIONS

1. A Proponent may not submit more than one proposal. This limitation also applies to the persons or entities in the case of a joint venture. If more than one proposal is received from a Proponent (or, in the case of a joint venture, from the persons or entities), all such proposals shall be rejected and no further consideration shall be given.
2. A joint venture is defined as an association of two or more parties which combine their money, property, knowledge, skills, time or other resources in a joint business enterprise agreeing to share the profits and the losses and each having some degree of control over the enterprise.
3. An arrangement whereby Canada contracts directly with a consultant who may retain sub-consultants or specialist consultants to perform portions of the services is not a joint venture arrangement. A sub-consultant or specialist consultant may, therefore, be proposed as part of the consultant team by more than one Proponent. The Proponent warrants that it has written permission from such sub-consultant or specialist consultant to propose their services in relation to the services to be performed.
4. Notwithstanding paragraph 3. above, in order to avoid any conflict of interest, or any perception of conflict of interest, a Proponent shall not include in its submission another Proponent as a member of its consultant team, as a sub-consultant or specialist consultant.

5. Any joint venture entered into for the provision of professional services or other services must be in full compliance with the requirements of any provincial or territorial law pertaining thereto in the Province or Territory in which the project is located.

GI 14 LICENSING REQUIREMENTS

1. Consultant team members and key personnel shall be, or be eligible to be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial law in the province of the work.
2. By virtue of submission of a proposal, the Proponent certifies that the Proponent's consultant team and key personnel are in compliance with the requirements of paragraph 1 above. The Proponent acknowledges that PWGSC reserves the right to verify any information in this regard and that false or erroneous certification may result in the proposal being declared non-responsive.

GI 15 REJECTION OF PROPOSAL

1. Canada may reject a proposal where any of the following circumstances is present:
 - (a) the Proponent has been declared ineligible for selection, following unsatisfactory performance in a previous project as determined in accordance with the department's performance review procedures;
 - (b) an employee, sub-consultant or specialist consultant included as part of the proposal has been declared ineligible, for selection for work with the department in accordance with the performance review procedure referred to in paragraph 1.(a), which would render the employee, sub-consultant or specialist consultant ineligible to bid on the requirement, or the portion of the requirement the employee, sub-consultant or specialist consultant is to perform;
 - (c) the Proponent is bankrupt or where, for whatever reason, its activities are rendered inoperable for an extended period;
 - (d) evidence, satisfactory to Canada, of fraud, bribery, fraudulent misrepresentation or failure to comply with any law protecting individuals against any manner of discrimination, has been received with respect to the Proponent, any of its employees, any sub-consultant or any specialist consultant included as part of the proposal;
 - (e) evidence satisfactory to Canada that based on past conduct or behavior, the Proponent, a sub-consultant, a specialist consultant or a person who is to perform the Services is unsuitable or has conducted himself/herself improperly;
 - (f) with respect to current or prior transactions with the Government of Canada,
 - (i) Canada has exercised its contractual remedies of taking the services out of the consultant's hands, suspension or termination for default with respect to a contract with the Proponent, any of its employees, any sub-consultant or any specialist consultant included as part of the proposal;
 - (ii) Canada determines that the Proponent's performance on other contracts, including the quality of the services provided and the quality and timeliness of the delivery of the project, is sufficiently poor to jeopardize the successful completion of the requirement being bid on.

2. Where Canada intends to reject a proposal pursuant to subsection 1.(f), the Contracting Authority will so inform the Proponent and provide the Proponent ten (10) days within which to make representations, before making a final decision on the proposal rejection.

GI 16 NOT APPLICABLE**GI 17 INSURANCE REQUIREMENTS**

1. The successful Proponent shall be required to obtain and maintain Professional Liability and Comprehensive General insurance coverage in accordance with the requirements set out elsewhere in the Request for Standing Offer documents.
2. No insurance requirement stipulated in the Request for Standing Offer documents should be construed as limiting any insurance required by federal, provincial or municipal law. Neither should it limit any coverage which the successful Proponent and other members of the consultant team may consider to be necessary for their own protection or to fulfill their obligations.
3. By virtue of submission of a proposal, the Proponent certifies that the Proponent and the other members of the consultant team as may be applicable are capable of obtaining, and will obtain and maintain liability insurance in accordance with the requirements set out in the proposal documents.

GI 18 JOINT VENTURE

1. A joint venture is an association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to bid together on a requirement. Proponents who bid as a joint venture must indicate clearly that it is a joint venture and provide the following information:
 - (a) the name of each member of the joint venture;
 - (b) the Procurement Business Number of each member of the joint venture;
 - (c) the name of the representative of the joint venture, i.e. the member chosen by the other members to act on their behalf, if applicable;
 - (d) the name of the joint venture, if applicable.
2. If the information is not clearly provided in the proposal, the Proponent must provide the information on request from the Contracting Authority.
3. The proposal and any resulting standing offer must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of all members of the joint venture. The Contracting Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the RFSO and any resulting standing offer. If a standing offer is issued to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of any contract resulting from a call-up against the standing offer.

GI 19 LATE SUBMISSIONS

Submissions delivered after the stipulated closing date and time will be returned unopened.

GI 20 DEFINITION OF PROPONENT AND LEGAL CAPACITY

"Proponent" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a proposal to provide services under a call-up resulting from a standing offer. It does not

include the parent, subsidiaries or other affiliates of the Proponent, or its sub-consultants. The Proponent must have the legal capacity to contract. If the Proponent is a sole proprietorship, a partnership or a corporate body, the Proponent must provide, if requested by the Contracting Authority, a statement and any requested supporting documentation indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business. This also applies to proponents submitting a proposal as a joint venture.

GI 21 DEBRIEFING

Should a Proponent desire a debriefing, the Proponent should contact the person identified on the front page of the Request for Standing Offer within 15 working days of the notification of the results of the solicitation. The debriefing will include an outline of the strengths and weaknesses of the submission, referring to the evaluation criteria. The confidentiality of information relating to other submissions will be protected. The debriefing may be provided in writing, by telephone or in person.

GI 22 FINANCIAL CAPABILITY

1. Financial Capability Requirement: The Proponent must have the financial capability to fulfill this requirement. To determine the Proponent's financial capability, the Contracting Authority may, by written notice to the Proponent, require the submission of some or all of the financial information detailed below during the evaluation of proposals. The Proponent must provide the following information to the Contracting Authority within fifteen (15) working days of the request or as specified by the Contracting Authority in the notice:
 - (a) Audited financial statements, if available, or the unaudited financial statements (prepared by the Proponent's outside accounting firm, if available, or prepared in-house if no external statements have been prepared) for the Proponent's last three fiscal years, or for the years that the Proponent has been in business if this is less than three years (including, as a minimum, the Balance Sheet, the Statement of Retained Earnings, the Income Statement and any notes to the statements).
 - (b) If the date of the financial statements in (a) above is more than five months before the date of the request for information by the Contracting Authority, the Proponent must also provide, unless this is prohibited by legislation for public companies, the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement), as of two months before the date on which the Contracting Authority requests this information.
 - (c) If the Proponent has not been in business for at least one full fiscal year, the following must be provided:
 - (i) the opening Balance Sheet on commencement of business (in the case of a corporation, the date of incorporation); and
 - (ii) the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement) as of two months before the date on which the Contracting Authority requests this information.
 - (d) A certification from the Chief Financial Officer or an authorized signing officer of the Proponent that the financial information provided is complete and accurate.
 - (e) A confirmation letter from all of the financial institution(s) that have provided short-term financing to the Proponent outlining the total of lines of credit granted to the Proponent and the amount of credit that remains available and not drawn upon as of one month prior to the date on which the Contracting Authority requests this information.

2. If the Proponent is a joint venture, the financial information required by the Contracting Authority must be provided by each member of the joint venture.
3. If the Proponent is a subsidiary of another company, then any financial information in 1. (a) to (e) above required by the Contracting Authority must be provided by the ultimate parent company. Provision of parent company financial information does not by itself satisfy the requirement for the provision of the financial information of the Proponent, and the financial capability of a parent cannot be substituted for the financial capability of the Proponent itself unless an agreement by the parent company to sign a Parental Guarantee, as drawn up by Public Works and Government Services Canada (PWGSC), is provided with the required information.
4. Financial Information Already Provided to PWGSC: The Proponent is not required to resubmit any financial information requested by the Contracting Authority that is already on file at PWGSC with the Contract Cost Analysis, Audit and Policy Directorate of the Policy, Risk, Integrity and Strategic Management Sector, provided that within the above-noted time frame:
 - (a) the Proponent identifies to the Contracting Authority in writing the specific information that is on file and the requirement for which this information was provided; and
 - (b) the Proponent authorizes the use of the information for this requirement.

It is the Proponent's responsibility to confirm with the Contracting Authority that this information is still on file with PWGSC.
5. Other Information: Canada reserves the right to request from the Proponent any other information that Canada requires to conduct a complete financial capability assessment of the Proponent.
6. Confidentiality: If the Proponent provides the information required above to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as permitted by the Access to Information Act, R.S., 1985, c. A-1, Section 20(1) (b) and (c).
7. Security: In determining the Proponent's financial capability to fulfill this requirement, Canada may consider any security the Proponent is capable of providing, at the Proponent's sole expense (for example, an irrevocable letter of credit from a registered financial institution drawn in favour of Canada, a performance guarantee from a third party or some other form of security, as determined by Canada).
8. In the event that a proposal is found to be non-compliant on the basis that the Proponent is considered NOT to be financially capable of performing the subject requirement, official notification shall be provided to the Proponent.

GI 23 REVISION OF PROPOSAL

A proposal submitted may be amended by letter or facsimile provided the revision is received at the office designated for the receipt of proposals, on or before the date and time set for the receipt of proposals. The revision must be on the Proponent's letterhead or bear a signature that identifies the Proponent, and must clearly identify the change(s) to be applied to the original proposal. The revision must also include the information identified in GI 10 2. d).

GI 24 PERFORMANCE EVALUATION

Proponents shall take note that the performance of the Consultant during and upon completion of the services shall be evaluated by Canada. The evaluation includes all or some of the following criteria: Design, Quality of Results, Management, Time and Cost. Should the Consultant's performance be considered unsatisfactory, the Consultant may be declared ineligible for future contracts. The form PWGSC-TPSGC 2913-1, SELECT - Consultant Performance Evaluation Report (<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/documents/2913-1.pdf>), is used to record the performance.

GI 25 PROPOSAL COSTS

No payment will be made for costs incurred in the preparation and submission of a proposal in response to the Request for Standing Offer. Costs associated with preparing and submitting a proposal, as well as any costs incurred by the Proponent associated with the evaluation of the proposal, are the sole responsibility of the Proponent.

GI 26 CONFLICT OF INTEREST - UNFAIR ADVANTAGE

1. In order to protect the integrity of the procurement process, proponents are advised that Canada may reject a proposal in the following circumstances:
 - (a) if the Proponent, any of its sub-consultants, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation or in any situation of conflict of interest or appearance of conflict of interest;
 - (b) if the Proponent, any of its sub-consultants, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other proponents and that would, in Canada's opinion, give or appear to give the Proponent an unfair advantage.
2. The experience acquired by a Proponent who is providing or has provided the goods and services described in the bid solicitation (or similar goods or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This Proponent remains however subject to the criteria established above.
3. Where Canada intends to reject a proposal under this section, the Contracting Authority will inform the Proponent and provide the Proponent an opportunity to make representations before making a final decision. Proponents who are in doubt about a particular situation should contact the Contracting Authority before bid closing. By submitting a proposal, the Proponent represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Proponent acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

GI 27 LIMITATION OF LIABILITY

Except as expressly and specifically permitted in this Request for Standing Offer, no Proponent or potential Proponent shall have any claim for any compensation of any kind whatsoever in relation to this Request for Standing Offer, or any aspect of the procurement process, and by submitting a proposal each Proponent shall be deemed to have agreed that it has no claim.

GI 28 STATUS AND AVAILABILITY OF RESOURCES

The Proponent certifies that, should it be issued a standing offer as a result of the Request for Standing Offer, every individual proposed in its proposal will be available to perform the Services resulting from a call-up against the Standing Offer as required by Canada's representatives and at the time specified in a

call-up or agreed to with Canada's representatives. If the Proponent is unable to provide the services of an individual named in its proposal, the Proponent may propose a substitute with at least the same qualifications and experience. The Proponent must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement for Canada's approval in its sole discretion.

STANDING OFFER PARTICULARS (SP)

- SP 1 General
- SP 2 Withdrawal/Revision
- SP 3 Period of the Standing Offer
- SP 4 Call-Up Limitation
- SP 5 Call-Up Procedure
- SP 6 Invoicing

STANDING OFFER PARTICULARS

SP 1 GENERAL

1. The Consultant acknowledges that a standing offer is not a contract and that the issuance of a Standing Offer and Call-up Authority does not oblige or commit Canada to procure or contract for any services listed in the Standing Offer.
2. The Consultant offers to provide and deliver to Canada the services described in the Standing Offer, in accordance with the pricing set out in the Standing Offer if, and when the Contracting Authority may request such services, in accordance with the conditions listed at subsection 3 below.
3. The Consultant understands and agrees that:
 - a) a call-up against the Standing Offer will form a contract only for those services which have been called-up, provided that such call-up is made in accordance with the provisions of the Standing Offer;
 - b) Canada's liability is limited to that which arises from call-ups against the Standing Offer made within the period specified in the Standing Offer;
 - c) Canada has the right to procure the services specified in the Standing Offer by means of any other contract, standing offer or contracting method;
 - d) the Standing Offer cannot be assigned or transferred in whole or in part;
 - e) the Standing Offer may be set aside by Canada at any time.

SP 2 WITHDRAWAL/REVISION

In the event that the Consultant wishes to withdraw the Standing Offer after authority to call-up against the Standing Offer has been given, the Consultant must provide no less than thirty (30) days' written notice to the Contracting Authority, unless specified otherwise in the Standing Offer. The thirty (30) days' period will start upon receipt of the notification by the Contracting Authority and the withdrawal will be effective at the expiry of that period. The Consultant must fulfill any and all call-ups which are made before the expiry of that period.

The period of the Standing Offer may only be extended, or its usage increased, by the Contracting Authority issuing a revision to the Standing Offer in writing.

SP 3 PERIOD OF THE STANDING OFFER

The period for placing call-ups against the Standing Offer shall be for three (3) years commencing from the start date identified on the Standing Offer.

If the Standing Offer is authorized for use beyond the initial period, the Consultant offers to extend its proposal for an additional one (1) year period under the same conditions and at the rates or prices specified in the Standing Offer.

The Consultant will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Contracting Authority thirty (30) days before the expiry of the Standing Offer. A revision to the Standing Offer will be issued by the Contracting Authority.

SP 4 CALL-UP LIMITATION

Each call-up against the Standing Offer will have a maximum limitation of expenditure of \$1,000,000.00 (Applicable Taxes included). The call-up limitation includes fees and all related disbursements.

SP 5 CALL-UP PROCEDURE

1. Services will be called-up as follows:

- a) The Departmental Representative will establish the scope of services to be performed. For each individual Call-Up, consultants will be considered using a computerized distribution system. This system will track all call-ups assigned to each consultant and will maintain a running total of the dollar value of business distributed. The system will contain for each consultant an ideal business distribution percentage which has been established as follows; 34% of the business for the top ranked consultant, 24% for the 2nd ranked consultant, 19% for the 3rd ranked consultant, 14% for the 4th ranked consultant, and 9% for the 5th. In the event fewer than five (5) consultants are successful, the undistributed % of business will be redistributed amongst the offerors being recommended using the following formula:

$$\text{Revised Distributions \%} = \frac{\text{pre-established \%}}{100 \text{ less the non distributed \%}} \times 100$$

The Consultant who is furthest under their respective ideal business distribution percentage in relation to the other consultants will be selected for the next call-up.

- b) The Consultant will be provided the scope of services and will submit a proposal to the Departmental Representative in accordance with the fixed hourly rates established under the Standing Offer. The Consultant's proposal shall include the category of personnel, name of personnel and the number of hours estimated/required to perform the services, as well as an estimate of proposed disbursements, if applicable. If the Consultant is unable to provide the services of an individual named in its proposal (submitted in response to the Request for Standing Offer), the Consultant may propose a substitute with at least the same qualifications and experience in the estimation of Canada. The Consultant must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement for Canada's approval in its sole discretion. If the Consultant is unable to provide a substitute with similar qualifications and experience, Canada may set aside the standing offer.
- c) For services from a Specialist Consultant that is not named or for which discipline is not identified in the Standing Offer, the Consultant's proposal shall include the category and name of personnel as well as their hourly rate(s) with the number of hours estimated/required by the Specialist Consultant to perform these services. A fixed fee or, where it is not possible or appropriate to agree upon a fixed fee, a time based fee to an upset limit will be established.
- d) For the preparation of bilingual documents, the Consultant shall estimate the required number of hours and multiply by the hourly rates established in the Standing Offer. If the services of a translation firm are required to produce bilingual documents, these costs shall be treated as a disbursement.
- e) A fixed fee or, where it is not possible or appropriate to agree upon a fixed fee, a time based fee to an upset limit will be established in accordance with the hourly rate(s) established in the Standing Offer.

- f) Standing Offer holders not possessing the required security clearance at time of call up, will be bypassed and PWGSC will proceed to the next consultant who possesses the required security clearance and it is furthest away from the ideal business distribution.
- 2. The Consultant will be authorized in writing by the Contracting Authority to proceed with the services by issuance of a Call-up against the Standing Offer.
- 3. Any proposed changes to the scope of work are to be discussed with the Departmental Representative but any resulting changes can only be authorized by an amendment issued by the Contracting Authority.

SP 6 INVOICING

- 1. For prompt processing of invoices, include the following information on each invoice for payment:
 - a) PWGSC project number;
 - b) Invoicing period with dates;
 - c) Work done to justify invoice (short narrative) for services provided
 - d) Summary of costs as follows:

Amount this invoice	(1)	Fees + Applicable Taxes = Total
Total previous invoices	(2)	Fees + Applicable Taxes = Total
Total invoiced to date	(1+2) =(3)	Fees + Applicable Taxes = Total
Agreed fees	(4)	Fees + Applicable Taxes = Total
Amount to complete	(4-3) =(5)	Fees + Applicable Taxes = Total
% Services completed this stage	(6)	
 - e) Authorized signatures of the consultant and the date.
- 2. Include with each invoice for authorized disbursements, receipt of original invoices (or legible copies if originals cannot be supplied) for all items claimed.

TERMS AND CONDITIONS

0220DA	General Conditions (GC)
0000DA	Supplementary Conditions (SC)
9998DA	Terms of Payment (TP)
9999DA	Consultant Services (CS)
2000DA	Calculation of Fees (CF)

0220DA GENERAL CONDITIONS

GC 1	Definitions
GC 2	Interpretations
GC 3	Not applicable
GC 4	Assignment
GC 5	Indemnification
GC 6	Notices
GC 7	Suspension
GC 8	Termination
GC 9	Taking the Services Out of the Consultant's Hands
GC 10	Time and Cost Records to be Kept by the Consultant
GC 11	National or Departmental Security
GC 12	Rights to Intellectual Property
GC 13	Conflict of Interest and Values and Ethics Codes for the Public Service
GC 14	Status of Consultant
GC 15	Declaration by Consultant
GC 16	Insurance Requirements
GC 17	Resolution of Disagreements
GC 18	Amendments
GC 19	Entire Agreement
GC 20	Contingency Fees
GC 21	Harassment in the Workplace
GC 22	Taxes
GC 23	Changes in the Consultant Team
GC 24	Joint and Several Liability
GC 25	Not Applicable
GC 26	International Sanctions
GC 27	Integrity Provisions - Standing Offer and Contract

GC 1 Definitions

Applicable Taxes means the Goods and Services Tax (GST), the Harmonized Sales Tax (HST), and any provincial tax, by law, payable by *Canada* such as, the Quebec Sales Tax (QST) as of April 1, 2013;

Average Bank Rate means the simple arithmetic mean of the *Bank Rate* in effect at 4:00 p.m. Eastern Time each day during the calendar month which immediately precedes the calendar month in which payment is made;

Bank Rate means the rate of interest established from time to time by the Bank of Canada as the minimum rate at which it makes short term advances to members of the Canadian Payments Association;

Canada, Crown, Her Majesty or the Government means Her Majesty the Queen in right of *Canada*;

Construction Contract means a contract entered into between *Canada* and a *Contractor* for the construction of the Project;

Construction Contract Award Price means the price at which a *Construction Contract* is awarded to a *Contractor*;

Construction Cost Estimate means an anticipated amount for which a *Contractor* will execute the construction of the Project;

Construction Cost Limit means that portion of the total amount of Project funds which shall not be exceeded on construction of the Project;

Consultant means the party identified in the Standing Offer to perform the *Consultant Services* under the Standing Offer and any subsequent Call-up, and includes the officer or employee of the *Consultant* identified in writing by the *Consultant*;

Contracting Authority means the party identified on the front cover page, responsible for the establishment of the Standing Offer, its amendments, administration, and any contractual issues relating to individual call-ups;

Contractor means a person, firm or corporation with whom *Canada* enters, or intends to enter, into a *Construction Contract*;

Contract Price means the amount stated in the Call-Up to be payable to the *Consultant* for the *Services*, exclusive of *Applicable Taxes*;

Cost Plan means the allocation of proposed costs among the various elements of the Project, as described in the *Project Brief or Terms of Reference*;

Days means continuous calendar days, including weekends and statutory public holidays;

Departmental Representative means the officer or employee of *Canada* identified to the consultant in writing to perform the *Departmental Representative's* duties under each Call-Up;

Mediation is a process of dispute resolution in which a neutral third party assists the parties involved in a dispute to negotiate their own settlement;

Project Brief or Terms of Reference means a document describing in sufficient detail the *Services* to be provided by the *Consultant* to permit the *Consultant* to proceed with the *Services* and may include general project information, scope of the work, site and design data, and time plan, specifically related to the Project;

Project Schedule means a time plan, including the sequence of tasks, milestone dates and critical dates which must be met for the implementation of the planning, design and construction phases of the Project;

Services means the Services provided by the *Consultant* and the Services required for the project as set forth in the Standing Offer and subsequent Call-up documents;

Specialist Consultant means any Architect, Professional Engineer, or other specialist, other than the *Consultant*, engaged by *Canada* directly or, at the specific request of *Canada*, engaged by the *Consultant*;

Sub-Consultant means any Architect, Professional Engineer, or other specialist engaged by the *Consultant* for the *Services* included in the Standing Offer or any subsequent Call-up;

Technical Documentation includes designs, reports, photographs, physical models, surveys, drawings, specifications, computer software developed for the purpose of the Project, computer printouts, design notes, calculations, CADD (Computer-aided Design and Drafting) files, and other data, information and material, prepared, computed, drawn, or produced and operating and maintenance manuals either prepared or collected for the Project.

Total Estimated Cost, Revised Estimated Cost, Increase (Decrease) on Page 1 of the Contract or Contract Amendment means an amount used for internal administrative purposes only that comprises the *Contract Price*, or the revised *Contract Price*, or the amount that would increase or decrease the *Contract Price* and the *Applicable Taxes* as evaluated by the *Contracting Authority*, and does not constitute tax advice on the part of *Canada*.

GC 2 Interpretations

1. Words importing the singular only also include the plural, and vice versa, where the context requires;
2. Headings or notes in the Standing Offer shall not be deemed to be part thereof, or be taken into consideration in its interpretation;
3. "Herein", "hereby", "hereof", "hereunder" and similar expressions refer to the Standing Offer as a whole and not to any particular subdivision or part thereof.

GC 3 Not Applicable

GC 4 Assignment

1. The Call-Up shall not be assigned, in whole or in part, by the *Consultant* without the prior consent of *Canada*.
2. An assignment of the Call-Up without such consent shall not relieve the *Consultant* or the assignee from any obligation under the Call-up, or impose any liability upon *Canada*.

GC 5 Indemnification

1. The *Consultant* shall indemnify and save harmless *Canada*, its employees and agents, from losses arising out of the errors, omissions or negligent acts of the *Consultant*, its employees and agents, in the performance of the *Services* under the Call-up that may result from the Standing Offer.

2. The *Consultant's* liability to indemnify or reimburse *Canada* under the Standing Offer shall not affect or prejudice *Canada* from exercising any other rights under law.

GC 6 Notices

1. Any notice, request, direction, consent, decision, or other communication that is required to be given or made by either party pursuant to the Standing Offer, shall be in writing, and shall be deemed to have been effectively given when:
 - (a) served personally, on the day it is delivered;
 - (b) forwarded by registered mail, on the day the postal receipt is acknowledged by the other party; or
 - (c) forwarded by facsimile or other electronic means of transmission, one working day after it was transmitted.
2. The address of either party, or the person authorized to receive notices, may be changed by notice in the manner set out in this provision.

GC 7 Suspension

1. The *Departmental Representative* may require the *Consultant* to suspend the *Services* being provided, or any part thereof, for a specified or unspecified period.
2. If a period of suspension does not exceed sixty (60) *days* and when taken together with other periods of suspension does not exceed ninety (90) *days*, the *Consultant* will, upon the expiration of that period, resume the performance of the *Services* in accordance with the terms of the Standing Offer and the relevant Call-up, subject to any agreed adjustment of the time schedule as referred to in CS 3 of clause 9999DA, *Consultant Services*.
3. If a period of suspension exceeds sixty (60) *days* or when taken together with other periods of suspension, the total exceeds ninety (90) *days*, and:
 - (a) the *Departmental Representative* and the *Consultant* agree that the performance of the *Services* shall be continued, then the *Consultant* shall resume performance of the *Services*, subject to any terms and conditions agreed upon by the *Departmental Representative* and the *Consultant*, or
 - (b) the *Departmental Representative* and the *Consultant* do not agree that the performance of the *Services* shall be continued, then the Call-Up shall be terminated by notice given by *Canada* to the *Consultant*, in accordance with the terms of GC 8.
4. Suspension costs related to this clause are as outlined in TP 8 of clause 9998DA, *Terms of Payment*.

GC 8 Termination

Canada may terminate any Call-up at any time in its sole discretion, and the fees paid to the *Consultant* will be in accordance with the relevant provisions in TP 9 of clause 9998DA, *Terms of Payment*.

GC 9 Taking the *Services* Out of the *Consultant's* Hands

1. *Canada* may take all or any part of the *Services* out of the *Consultant's* hands and may employ reasonable means necessary to complete such *Services* in the event that:

- (a) The *Consultant* has become insolvent or has committed an act of bankruptcy, and has neither made a proposal to the *Consultant's* creditors nor filed a notice of intention to make such a proposal, pursuant to the *Bankruptcy and Insolvency Act*, or
 - (b) the *Consultant* fails to perform any of the *Consultant's* obligations under the Standing Offer or any of the Call-ups or, in Canada's opinion, so fails to make progress as to endanger performance of the Standing Offer or any of its call-ups, in accordance with its terms.
- 2. If the *Consultant* has become insolvent or has committed an act of bankruptcy, and has either made a proposal to the *Consultant's* creditors or filed a notice of intention to make such a proposal, pursuant to the *Bankruptcy and Insolvency Act*, the *Consultant* shall immediately forward a copy of the proposal or the notice of intention to the *Contracting Authority*.
- 3. Before the *Services* or any part thereof are taken out of the *Consultant's* hands under GC 9.1(b), the *Departmental Representative* will provide notice to the *Consultant*, and may require such failure of performance or progress to be corrected. If within fourteen (14) days after receipt of notice the default is not corrected or corrective action is not initiated to correct such fault, Canada may, by notice, without limiting any other right or remedy, take all or any part of the *Services* out of the *Consultant's* hands.
- 4. If the *Services* or any part thereof have been taken out of the *Consultant's* hands, the *Consultant* will be liable for, and upon demand pay to *Canada*, an amount equal to all loss and damage suffered by *Canada* by reason of the non-completion of the *Services* by the *Consultant*.
- 5. If the *Consultant* fails to pay on demand for the loss or damage as a result of GC 9.4, *Canada* will be entitled to deduct and withhold the same from any payments due and payable to the *Consultant*.
- 6. If the *Services* or any part thereof are taken out of the *Consultant's* hands as a result of GC 9.1(b) and GC 9.3, the amount referred to in GC 9.5 shall remain in the Consolidated Revenue Fund until an agreement is reached or a decision of a court or tribunal is rendered. At that time the amount, or any part of it, which may become payable to the *Consultant* shall be paid together with interest from the due date referred to in TP 2 of clause 9998DA, Terms of Payment, and in accordance with the terms of the Standing Offer.
- 7. The taking of the *Services*, or any part thereof, out of the *Consultant's* hands does not relieve or discharge the *Consultant* from any obligation under the Standing Offer, the Call-up, or imposed upon the *Consultant* by law, in respect to the *Services* or any part thereof that the *Consultant* has performed.

GC 10 Time and Cost Records to be Kept by the Consultant

- 1. Time charged and the accuracy of the *Consultant's* time recording system may be verified by the *Departmental Representative* before or after payment is made to the *Consultant* under the terms and conditions of the Call up.
- 2. The *Consultant* shall keep accurate time and cost records and, if required for the purposes of the Standing Offer, shall make these documents available to the *Departmental Representative* who may make copies and take extracts therefrom.
- 3. The *Consultant* shall afford facilities for audit and inspection upon request and shall provide the *Departmental Representative* with such information as may be required from time to time with reference to the documents referred to in GC 10.2.

4. The *Consultant* shall, unless otherwise specified, keep the time sheets and cost records available for audit and inspection for a period of at least six (6) years following completion of the *Services*.
5. If the verification is done after payment by Canada, the *Consultant* agrees to repay any overpayment immediately upon demand.

GC 11 National or Departmental Security

1. If the *Departmental Representative* is of the opinion that the Project is of a class or kind that involves national or departmental security, the *Consultant* may be required:
 - (a) to provide any information concerning persons employed for purposes of the Standing Offer unless prohibited by law;
 - (b) to remove any person from the Project and its site if that person cannot meet the prescribed security requirements; and
 - (c) to retain the Project *Technical Documentation* while in the *Consultant's* possession in a manner specified by the *Departmental Representative*.
2. Notwithstanding the provisions of GC 12, if the Project is of a class or kind that involves national or departmental security, the *Consultant* shall not issue, disclose, discard or use the Project *Technical Documentation* on another project without the written consent of the *Departmental Representative*.

GC 12 Rights to Intellectual Property

1. Definitions

"Background" means all Technical Output that is not Foreground and that is proprietary to or the confidential information of the *Consultant*, the *Consultant's Sub-Consultants*, or any other entity engaged by the *Consultant* in the performance of the *Services*;

"Foreground" means any Invention first conceived, developed or reduced to practice as part of the *Services* and all other Technical Output conceived, developed, produced or implemented as part of the *Services*;

"IP Rights" means any intellectual property rights recognized by law, including any intellectual property right protected through legislation (such as that governing copyright, patents, industrial design, or integrated circuit topography) or arising from protection of information as a trade secret or as confidential information;

"Invention" means any new and useful art, process, machine, manufacture or composition of matter, or any new and useful improvement in any art, process, machine, manufacture or composition of matter, whether or not patentable and without limiting the foregoing the term includes any unique design and construction system;

"Technical Output" means: (i) all information of a scientific, technical, or artistic nature relating to the *Services*, whether oral or recorded in any form or medium and whether or not subject to copyright, including but not limited to any Inventions, designs, methods, reports, photographs, physical models, surveys, drawings, specifications developed for the purpose of the Project; as well as (ii) computer printouts, design notes, calculations, CADD (Computer-aided Design and Drafting) files, and other data, information and material, prepared, computed, drawn, or produced for the purpose of the Project; and (iii) operating and maintenance manuals prepared or collected

for the Project; and (iv) any buildings, built works, structures and facilities constructed as, or as part of, the Project. Technical Output does not include data concerned with the administration of the Standing Offer and/or Call-Up by Canada or the Consultant, such as internal financial or management information, unless it is a deliverable under the terms of the Standing Offer and/or Call-Up.

2. Identification and Disclosure of Foreground

The *Consultant* shall:

- (a) promptly report and fully disclose to Canada all Foreground that could be Inventions, and shall report and fully disclose to Canada all other Foreground not later than the time of completion of the *Services* or such earlier time as Canada or the Standing Offer and/or Call-Up may require, and
- (b) for each disclosure referred to in (a), indicate the names of all *Sub-Consultants* at any tier, if any, in which IP Rights to any Foreground have vested or will vest.

Before and after final payment to the *Consultant*, Canada shall have the right to examine all records and supporting data of the *Consultant* which Canada reasonably decides is pertinent to the identification of the Foreground.

3. IP Rights Vest with *Consultant*

Subject to articles GC 12.10 and GC 12.11 and the provisions of GC 11 National or Departmental Security, and without affecting any IP Rights or interests therein that have come into being prior to the Standing Offer and/or Call-Up or that relate to information or data supplied by *Canada* for the purposes of the Standing Offer and/or Call-Up, all IP Rights in the Foreground shall immediately, as soon as they come into existence, vest in and remain the property of the *Consultant*.

4. Ownership Rights in Deliverables

Notwithstanding the *Consultant's* ownership of the IP Rights in the Foreground that is a prototype, built work, building, structure, facility, model or custom or customized system or equipment together with associated manuals and other operating and maintenance documents and tools, *Canada* shall have unrestricted ownership rights in those deliverables, including the right to make them available for public use, whether for a fee or otherwise, and the right to sell them.

5. Licence to Foreground

Without limiting any implied licences that may otherwise vest in *Canada*, and in consideration of *Canada's* contribution to the cost of development of the Foreground, the *Consultant* hereby grants to *Canada* a non-exclusive, perpetual, irrevocable, worldwide, fully-paid and royalty-free licence to exercise all IP Rights in the Foreground that vest in the *Consultant* pursuant to article GC 12.3, for the purpose of:

- (a) the construction or implementation of any building, built works, structures and facilities, contemplated by the Project;
- (b) the further development or alteration or evolution of any part of the constructed or implemented Project, including procurement of materials and components for this purpose;

- (c) the further development, modification (including additions or deletions), completion, translation, or implementation of the Foreground and any addition to it as *Canada* may require for the purposes of the completion, utilization and subsequent evolution of the Project;
- (d) the use, occupancy, operation, exploitation, maintenance, repair or restoration of the constructed or implemented or subsequently modified Project, including the procurement of replacement materials and components required for any such purpose; and
- (e) the publishing and transmission of reproductions of the Project or any part thereof in the form of paintings, drawings, engravings, photographs or cinematographic works, to the public, in hard copy or by any electronic or other means, except for copies in the nature of architectural drawings or plans.

6. Licence to Foreground for Other Projects

The *Consultant* hereby grants to *Canada* a non-exclusive, perpetual, world-wide, irrevocable licence to exercise all IP Rights that vest in the *Consultant* pursuant to paragraph GC 12.3 for the purpose of planning, designing and constructing or otherwise implementing any project other than the Project, and for any purpose set out in paragraph GC 12.5 as it relates to such other project. In the event that *Canada* exercises such IP Rights in another project, and provided that *Canada* does not already have equivalent rights under a previous contract or otherwise, *Canada* agrees to pay to the *Consultant* reasonable compensation determined in accordance with current industry practice and having regard to *Canada's* contribution to the cost of development of the Foreground. The *Consultant* shall ensure that in any sale, assignment, transfer or licence of any of the IP Rights that vest in the *Consultant* under the Standing Offer and/or Call-Up, the purchaser, assignee, transferee or licensee agrees to be bound by the terms of this provision and to accept reasonable compensation as is contemplated herein. The *Consultant* shall also ensure that any such purchaser, assignee, transferee or licensee of the IP Rights is required to impose the same obligations on any subsequent purchaser, transferee, assignee or licensee.

7. Licence to Background

Without limiting any implied licences that may otherwise vest in *Canada*, the *Consultant* hereby grants to *Canada* a non-exclusive, perpetual, irrevocable, worldwide, fully-paid and royalty-free licence to exercise such of the IP Rights in any Background incorporated into the *Services* or necessary for the performance of the *Services* as may be required

- (a) for the purposes contemplated in article GC 12.5 and GC 12.6;
- (b) for disclosure to any contractor engaged by *Canada*, or bidder for such a contract, to be used solely for a purpose set out in article GC 12.5 and GC 12.6;

and the *Consultant* agrees to make any such Background available to *Canada* upon request.

8. *Canada's* Right to Disclose and Sub-license

The *Consultant* acknowledges that *Canada* may wish to award contracts, which may include a competitive process, for any of the purposes contemplated in article GC 12.5, GC 12.6 and GC 12.7. The *Consultant* agrees that *Canada's* licence in relation to the IP Rights in the Foreground and in the Background, includes the right to disclose that Foreground and Background to bidders for such contracts, and to sub-license or otherwise authorize the use of that Foreground and Background by any contractor or consultant engaged by *Canada* for the purpose of carrying out such a contract.

9. *Consultant's Right to Grant Licence*

- (a) The *Consultant* represents and warrants that the *Consultant* has, or the *Consultant* shall obtain without delay, the right to grant to *Canada* the licence to exercise the IP Rights in the Foreground and the Background as required by the Standing Offer and/or Call-Up.
- (b) Where the IP Rights in any Background or Foreground are or will be owned by a *Sub-Consultant*, the *Consultant* shall either obtain a licence from that *Sub-Consultant* that permits compliance with articles GC 12.5, GC 12.6 and GC 12.7 or shall arrange for the *Sub-Consultant* to convey directly to *Canada* the same rights by execution of the form provided for that purpose by *Canada* no later than the time of disclosure to *Canada* of that Background and Foreground.

10. *Trade Secrets and Confidential Information*

The *Consultant* shall not use or incorporate any trade secrets or confidential information in any Foreground or Background used or created in performance of the Standing Offer and/or Call-Up.

11. *Canada Supplied Information*

- (a) Where performance of the *Services* involves the preparation of a compilation using information supplied by *Canada*, then the IP Rights that shall vest under paragraph GC 12.3 shall be restricted to the IP Rights in Foreground that are capable of being exploited without the use of the information supplied by *Canada*. All IP Rights in any compilation, the Foreground in which cannot be exploited without the use of such *Canada* supplied information shall vest in *Canada*. The *Consultant* agrees that the *Consultant* shall not use or disclose any *Canada* supplied information for any purpose other than completing the performance of the *Services*. The *Consultant* shall maintain the confidentiality of such information. Unless the Standing Offer and/or Call-Up otherwise expressly provides, the *Consultant* shall deliver to *Canada* all such information together with every copy, draft, working paper and note thereof that contains such information upon the completion or termination of the Standing Offer and/or Call-Up, or at such earlier time as *Canada* may require.
- (b) If the *Consultant* wishes to make use of any *Canada* supplied information that was supplied for purposes of the Standing Offer and/or Call-Up, for the commercial exploitation or further development of any of the Foreground, then the *Consultant* may make a written request for a licence to exercise the required IP Rights in that *Canada* supplied information, to *Canada*. The *Consultant* shall give *Canada* an explanation as to why such a licence is required. Should *Canada* agree to grant such a licence, it shall be on terms and conditions to be negotiated between the parties including payment of compensation to *Canada*.

12. *Transfer of IP Rights*

- (a) If *Canada* takes the *Services* out of the *Consultant's* hands in accordance with GC 9 of the General Conditions, in whole or in part, or if the *Consultant* fails to disclose any Foreground in accordance with article GC 12.2, *Canada* may upon reasonable notice, require the *Consultant* to convey to *Canada* all of the IP Rights in the Foreground or in the case of a failure to disclose, all the IP Rights in the Foreground not provided. The IP Rights to be conveyed shall include the IP Rights in any Foreground that have vested or are to vest in a *Sub-Consultant*. In the case of IP Rights in Foreground which have been sold or assigned to a party other than a *Sub-Consultant*, the *Consultant* shall not be obligated to convey those IP Rights to *Canada*, but shall pay to *Canada* on demand an amount equal to the consideration which the *Consultant* received from the sale or

assignment of the IP Rights in that Foreground or, in the case of a sale or assignment was not at arms length, the fair market value of the IP Rights in that Foreground, in each case including the value of future royalties or licence fees.

- (b) In the event of the issuance by Canada of a notice referred to in (a), the *Consultant* shall, at the *Consultant's* own expense and without delay, execute such conveyances or other documents relating to title to the IP Rights as Canada may require, and the *Consultant* shall, at *Canada's* expense, afford Canada all reasonable assistance in the preparation of applications and in the prosecution of any applications for, or any registration of, any IP Right in any jurisdiction, including without limitation the assistance of the inventor in the case of Inventions.
- (c) Until the *Consultant* completes the performance of the *Services* and discloses all of the Foreground in accordance with article GC 12.2, and subject to the provisions of GC 11 National or Departmental Security, the *Consultant* shall not, without the prior written permission of Canada, sell, assign or otherwise transfer title to the IP Rights in any of the Foreground, or license or otherwise authorize the use of the IP Rights in any of the Foreground by any person.
- (d) In any sale, assignment, transfer or licence of IP Rights in Foreground by the *Consultant* except a sale or licence for end use of a product based on Foreground, the *Consultant* shall impose on the other party all of its obligations to *Canada* in relation to the IP Rights in the Foreground and any restrictions set out in the Standing Offer and/or Call-Up on the use or disposition of the IP Rights in the Foreground (and, if applicable, the Foreground itself), including the obligation to impose the same obligations and restrictions on any subsequent transferee, assignee or licensee. The *Consultant* shall promptly notify *Canada* of the name, address and other pertinent information in regard to any transferee, assignee or licensee.

GC 13 Conflict of Interest and Values and Ethics Codes for the Public Service

- 1. The *Consultant* declares that the *Consultant* has no pecuniary interest in the business of any third party that would cause, or seem to cause, a conflict of interest in carrying out the *Services*, and should such an interest be acquired during the life of the Standing Offer, the *Consultant* shall declare it immediately to the *Departmental Representative*.
- 2. The *Consultant* shall not have any tests or investigations carried out by any persons, firms, or corporations, that may have a direct or indirect financial interest in the results of those tests or investigations.
- 3. The *Consultant* shall not submit, either directly or indirectly, a bid for any Construction Contract related to the Project.
- 4. The *Consultant* acknowledges that no individuals who are subject to the provisions of the Conflict of Interest Act, 2006, c. 9, s.2, the Conflict of Interest Code for Members of the House of Commons, the Values and Ethics Code for the Public Services, or all other codes of values and ethics applicable within specific organizations cannot derive any direct benefit resulting from the Standing Offer or subsequent Call-ups.
- 5. (a) The *Consultant* shall not be eligible to compete as a consultant or sub-consultant for a project which may result from the provision of the *Services* if the *Consultant* is involved in the development of a Project Brief or Terms of Reference, a Request for Proposal or similar documents for such project.

- (b) The Consultant providing certain pre-design services (e.g. studies, analysis, schematic design) that do not involve the development of a Project Brief or Terms of Reference, a Request for Proposal or similar documents for such project may be eligible to compete as a consultant or sub-consultant for a project which may result from the provision of these services. The experience acquired by a Consultant who has only provided pre-design services, where the information / documentation resulting from these services is made available to other proponents, will not be considered by Canada as conferring an unfair advantage or creating a conflict of interest.

GC 14 Status of Consultant

The Consultant is an independent contractor engaged by Canada to perform the Services. Nothing in the Standing Offer through a Call-up is intended to create a partnership, a joint venture or an agency between Canada and the other party or parties. The Consultant must not represent itself as an agent or representative of Canada to anyone. Neither the Consultant nor any of its personnel is engaged as an employee or agent of Canada. The Consultant is responsible for all deductions and remittances required by law in relation to its employees.

GC 15 Declaration by Consultant

The *Consultant* declares that:

- (a) based on the information provided pertaining to the *Services* required under the Standing Offer, the *Consultant* has been provided sufficient information by the *Departmental Representative* to enable the *Services* required under the Standing Offer to proceed and is competent to perform the *Services* and has the necessary licences and qualifications including the knowledge, skill and ability to perform the *Services*; and
- (b) the quality of *Services* to be provided by the *Consultant* shall be consistent with generally accepted professional standards and principles.

GC 16 Insurance Requirements

1. General

- a) The Consultant shall ensure that appropriate liability insurance coverage is in place to cover the consultant and the members of the consultant team and shall maintain all required insurance policies as specified herein.
- b) The Consultant shall, if requested by the Contracting Officer at any time, provide to the Contracting Officer an Insurer's Certificate of Insurance and/or the originals or certified true copies of all contracts of insurance maintained by the Consultant pursuant to the provisions contained herein.
- c) The payment of monies up to the deductible amount made in satisfaction of a claim shall be borne by the Consultant.
- d) Any insurance coverages additional to those required herein that the Consultant and the other members of the consultant team may deem necessary for their own protection or to fulfill their obligations shall be at their own discretion and expense.

2. Commercial General Liability

- a) The insurance coverage provided shall not be less than that provided by IBC Form 2100, as amended from time to time, and shall have: a limit of liability of not less than

\$5,000,000.00 per occurrence; an aggregate limit of not less than \$5,000,000.00 within any policy year.

- b) The policy shall insure the Consultant and shall include Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services as an Additional Insured, with respect to liability arising out of the performance of the Services.

3. Professional Liability

- a) The Professional Liability insurance coverage shall be in an amount usual for the nature and scope of the Services but, shall have a limit of liability of not less than \$1,000,000 per claim, and be continually maintained from the commencement of performance of the Services until five (5) years after their completion.
- b) The following provision must be incorporated into the conditions of the Consultant's Professional Liability insurance coverage: "Notice of Cancellation of Insurance Coverage: The Insurer agrees to give the Contracting Authority at least thirty (30) days' prior written notice of any policy cancellation and before making any adverse material changes."

GC 17 Resolution of Disagreements

1. In the event of a disagreement regarding any aspect of the *Services* or any instructions given under the Standing Offer and subsequent Call-ups:
 - (a) The *Consultant* may give a notice of disagreement to the *Departmental Representative*. Such notice shall be promptly given and contain the particulars of the disagreement, any changes in time or amounts claimed, and reference to the relevant clauses of the Standing Offer and Call-up;
 - (b) The *Consultant* shall continue to perform the *Services* in accordance with the instructions of the *Departmental Representative*; and
 - (c) The *Consultant* and the *Departmental Representative* shall attempt to resolve the disagreement by negotiations conducted in good faith. The negotiations shall be conducted, first, at the level of the *Consultant's* project representative and the *Departmental Representative* and, secondly and if necessary, at the level of a principal of the *Consultant* firm and a senior departmental manager.
2. The *Consultant's* continued performance of the *Services* in accordance with the instructions of the *Departmental Representative* shall not jeopardize the legal position of the *Consultant* in any disagreement.
3. If it was subsequently agreed or determined that the instructions given were in error or contrary to the Standing Offer or Call-up, *Canada* shall pay the *Consultant* those fees the *Consultant* shall have earned as a result of the change(s) in the *Services* provided, together with those reasonable disbursements arising from the change(s) and which have been authorized by the *Departmental Representative*.
4. The fees mentioned in GC 17.3 shall be calculated in accordance with the Terms of Payment set out in the Standing Offer and the relevant Call-up.
5. If the disagreement is not settled, the *Consultant* may make a request to the *Departmental Representative* for a written departmental decision and the *Departmental Representative* shall give notice of the departmental decision within fourteen (14) days of receiving the request, setting out the particulars of the response and any relevant clauses of the Standing Offer or Call-up.

6. Within fourteen (14) *days* of receipt of the written departmental decision, the *Consultant* shall notify the *Departmental Representative* if the *Consultant* accepts or rejects the decision.
7. If the *Consultant* rejects the departmental decision, the *Consultant*, by notice may refer the disagreement to *Mediation*.
8. If the disagreement is referred to *Mediation*, the *Mediation* shall be conducted with the assistance of a skilled and experienced mediator chosen by the *Consultant* from a list of mediators proposed by Canada, and departmental *Mediation* procedures shall be used unless the parties agree otherwise.
9. Negotiations conducted under the Standing Offer and any resulting Call-up, including those conducted during *Mediation*, shall be without prejudice.

GC 18 Amendments

The Standing Offer or any resulting Call-up may not be amended, or modified, nor shall any of its terms and conditions be waived, except by agreement in writing executed by the Consultant and the Contracting Authority.

GC 19 Entire Agreement

The Standing Offer and Call-up constitutes the entire and only agreement between the parties and supersedes all previous negotiations, communications and other agreements, whether written or oral, unless they are incorporated by reference in the Standing Offer and/or Call-up. There are no terms, covenants, representations, statements or conditions binding on the parties other than those contained in the Standing Offer and Call-up.

GC 20 Contingency Fees

The Consultant certifies that it has not, directly or indirectly, paid or agreed to pay and agrees that it will not, directly or indirectly, pay a contingency fee for the solicitation, negotiation or obtaining of the Standing Offer to any person, other than an employee of the Consultant acting in the normal course of the employee's duties. In this section, "contingency fee" means any payment or other compensation that depends or is calculated based on a degree of success in soliciting, negotiating or obtaining the Standing Offer and "person" includes any individual who is required to file a return with the registrar pursuant to section 5 of the Lobbying Act, 1985, c. 44 (4th Supplement).

GC 21 Harassment in the Workplace

1. The Consultant acknowledges the responsibility of Canada to ensure, for its employees, a healthy work environment, free of harassment. A copy of the Treasury Board policy, the Policy on the Prevention and Resolution of Harassment in the Workplace, which is also applicable to the Consultant, is available on the Treasury Board Web site.
2. The Consultant must not, either as an individual, or as a corporate or unincorporated entity, through its employees or subconsultants, harass, abuse, threaten, discriminate against or intimidate any employee, consultant or other individual employed by, or under contract with Canada. The Consultant will be advised in writing of any complaint and will have the right to respond in writing. Upon receipt of the Consultant's response, the Contracting Authority will, at its entire discretion, determine if the complaint is founded and decide on any action to be taken.

GC 22 Taxes

1. Federal government departments and agencies are required to pay *Applicable Taxes*.
2. *Applicable Taxes* will be paid by Canada as provided in the invoice submission. *Applicable Taxes* must be specified on all invoices as a separate item along with corresponding registration numbers from the tax authorities. All items that are zero-rated, exempt or to which these *Applicable Taxes* do not apply must be identified as such on all invoices. It is the sole responsibility of the Consultant to charge *Applicable Taxes* at the correct rate in accordance with applicable legislation. The Consultant agrees to remit to appropriate tax authorities any amounts of *Applicable Taxes* paid or due.
3. The Consultant is not entitled to use Canada's exemptions from any tax, such as provincial sales taxes, unless otherwise specified by law. The Consultant must pay applicable provincial sales tax, ancillary taxes, and any commodity tax, on taxable goods or services used or consumed in the performance of the contract (in accordance with applicable legislation), including for material incorporated into real property.
4. In those cases where *Applicable Taxes*, customs duties, and excise taxes are included in the *Contract Price*, the *Contract Price* will be adjusted to reflect any increase, or decrease, of *Applicable Taxes*, customs duties, and excise taxes that will have occurred between bid submission and contract award. However, there will be no adjustment for any change to increase the *Contract Price* if public notice of the change was given before bid submission date in sufficient detail to have permitted the Consultant to calculate the effect of the change.
5. Tax Withholding of 15 Percent - Canada Revenue Agency

Pursuant to the Income Tax Act, 1985, c. 1 (5th Supp.) and the Income Tax Regulations, Canada must withhold 15 percent of the amount to be paid to the Consultant in respect of services provided in Canada if the Consultant is not a resident of Canada, unless the Consultant obtains a valid waiver from the Canada Revenue Agency. The amount withheld will be held on account for the Consultant in respect to any tax liability which may be owed to Canada.

GC 23 Changes in the *Consultant* team

1. Should an entity or person named in the Consultant's proposal as an entity or person who is to perform the *Services* or part of the *Services* be unable to perform or complete the *Services*, the *Consultant* shall obtain the concurrence of the *Departmental Representative* prior to performing or completing the *Services*, or entering into an agreement with another equally qualified entity or person to perform or complete the *Services*, such concurrence not to be unreasonably withheld.
2. In seeking to obtain the concurrence of the *Departmental Representative* referred to in paragraph 1, the *Consultant* shall provide notice in writing to the *Departmental Representative* containing:
 - (a) the reason for the inability of the entity or person to perform the *Services*;
 - (b) the name, qualifications and experience of the proposed replacement entity or person, and
 - (c) if applicable, proof that the entity or person has the required security clearance granted by *Canada*.
3. The *Consultant* shall not, in any event, allow performance of any part of the *Services* by unauthorized replacement entities or persons, and acceptance of a replacement entity or person by the *Departmental Representative* shall not relieve the *Consultant* from responsibility to perform the *Services*.

4. The *Departmental Representative*, with the authority of Canada, may order the removal from the *Consultant* team of any unauthorized replacement entity or person and the *Consultant* shall immediately remove the entity or person from the performance of the *Services* and shall, in accordance with paragraphs 1. and 2., secure a further replacement.
5. The fact that the *Departmental Representative* does not order the removal of a replacement entity or person from the performance of the *Services* shall not relieve the *Consultant* from the *Consultant's* responsibility to meet all the *Consultant's* obligations in the performance of the *Services*.

GC 24 Joint and Several Liability

If at any time there is more than one legal entity constituting the *Consultant*, their covenants under the Standing Offer and/or Call-Up shall be considered to be joint and several and apply to each and every entity. If the *Consultant* is or becomes a partnership or joint venture, each legal entity who is a member or becomes a member of the partnership or joint venture or its successors is and continues to be jointly and severally liable for the performance of the work and all the covenants of the *Consultant* pursuant to the Standing Offer and/or Call-Up, whether or not that entity ceases to be a member of the partnership, joint venture or its successor.

GC 25 Not Applicable

GC 26 International Sanctions

1. Persons in Canada, and Canadians outside of Canada, are bound by economic sanctions imposed by Canada. As a result, the Government of Canada cannot accept delivery of goods or services that originate, either directly or indirectly, from the countries or persons subject to [economic sanctions](http://www.international.gc.ca/sanctions/index.aspx?lang=eng) (<http://www.international.gc.ca/sanctions/index.aspx?lang=eng>).
2. The *Consultant* must not supply to the Government of Canada any goods or services which are subject to economic sanctions.
3. The *Consultant* must comply with changes to the regulations imposed during the period of the Call-Up. The *Consultant* must immediately advise Canada if it is unable to perform the *Services* as a result of the imposition of economic sanctions against a country or person or the addition of a good or service to the list of sanctioned goods or services. If the parties cannot agree on a work around plan, the Call-Up will be terminated for the convenience of Canada in accordance with terms and conditions of the Standing Offer and/or Call-Up.

GC 27 Integrity Provisions - Standing Offer and Contract

1. The *Consultant* agrees to comply with the Code of Conduct for Procurement (<http://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/contexte-context-eng.html>) and to be bound by its terms. In addition, the *Consultant* must also comply with the terms set out in this section.
2. The *Consultant* confirms that it understands that, to ensure fairness, openness and transparency in the procurement process, the commission of certain acts or offences may result in setting aside the Standing Offer and terminating for default any resulting contracts. If the *Consultant* made a false declaration in its proposal, makes a false declaration under the contract, fails to diligently maintain up-to-date the information requested, or if the *Consultant* or any of the *Consultant's* Affiliates fail to remain free and clear of any acts or convictions and any conditional or absolute discharges specified in these Integrity Provisions during the period of the Standing Offer, such false declaration or failure to comply may result, following a notice period, in the setting aside of the Standing Offer and the termination for default of any resulting contracts. The *Consultant*

understands that a termination for default will not restrict Canada's right to exercise any other remedies that may be available against the Consultant and agrees to immediately return any advance payments.

3. Affiliates

For the purpose of these Integrity Provisions, everyone, including but not limited to organizations, bodies corporate, societies, companies, firms, partnerships, associations of persons, parent companies and subsidiaries, whether partly or wholly-owned, as well as individuals and directors, are Consultant's Affiliates if:

- a. directly or indirectly either one controls or has the power to control the other, or
- b. a third party has the power to control both.

Indicia of control, include, but are not limited to, interlocking management or ownership, identity of interests among family members, shared facilities and equipment, common use of employees, or a business entity created following the acts or convictions and any conditional or absolute discharges specified in these Integrity Provisions which has the same or similar management, ownership, or principal employees, as the case may be.

- 4. The Consultant who is incorporated or who is a sole proprietorship has already provided a list of names of all individuals who are directors of the Consultant or the name of the owner. The Consultant who has submitted a proposal as a joint venture has already provided a list of names of all directors, or the name of the owner, for each member of the joint venture. The Consultant must diligently inform Canada in writing of any changes affecting the list of names of directors during the period of the Standing Offer and the period of any resulting contracts. The Consultant must also, when requested, provide Canada with properly completed and signed consent forms and associated information, and cooperate to the verification process.
- 5. The Consultant certifies that it is aware, and that its Affiliates are aware, that Canada may verify the information provided by the Consultant, including the information relating to the acts or convictions and any conditional or absolute discharges specified in these Integrity Provisions through independent research, use of any government resources or by contacting third parties.
- 6. The Consultant certifies that neither the Consultant nor any of the Consultant's Affiliates have directly or indirectly, paid or agreed to pay, and will not, directly or indirectly, pay a contingency fee to any individual for the solicitation, negotiation or obtaining of the Standing Offer and any call-ups made against the Standing Offer if the payment of the fee would require the individual to file a return under section 5 of the Lobbying Act.

7. Time Period

The Time Period is 10 years and is measured from the date of the conviction or from the date of the conditional or absolute discharge.

In addition, for a conviction under paragraphs a. or b. of subsection 8, following the 10-year period, a pardon or a record suspension must have been obtained, or capacities must have been restored by the Governor in Council. The Consultant must therefore provide a copy of confirming documentation from an official source for its certification to be found true by Canada for the purpose of these Integrity Provisions.

- 8. The Consultant certifies that neither the Consultant nor any of the Consultant's Affiliates have been convicted of an offence or received a conditional or an absolute discharge under any of the following provisions, unless the time period, as defined in the Time Period subsection, has elapsed:

- a. paragraph 80(1)(d) (*False entry, certificate or return*), subsection 80(2) (*Fraud against Her Majesty*) or section 154.01 (*Fraud against Her Majesty*) of the *Financial Administration Act*, or
- b. section 121 (*Frauds on the government and Contractor subscribing to election fund*), section 124 (*Selling or Purchasing Office*), section 380 (*Fraud*) for fraud committed against Her Majesty or section 418 (*Selling defective stores to Her Majesty*) of the *Criminal Code*, or
- c. section 119 (*Bribery of judicial officers, etc*), section 120 (*Bribery of officers*), section 346 (*Extortion*), sections 366 to 368 (*Forgery and other offences resembling forgery*), section 382 (*Fraudulent manipulation of stock exchange transactions*), section 382.1 (*Prohibited insider trading*), section 397 (*Falsification of books and documents*), section 422 (*Criminal breach of contract*), section 426 (*Secret commissions*), section 462.31 (*Laundering proceeds of crime*) or sections 467.11 to 467.13 (*Participation in activities of criminal organization*) of the *Criminal Code*, or
- d. section 45 (*Conspiracies, agreements or arrangements between competitors*), section 46 (*Foreign directives*), section 47 (*Bid rigging*), section 49 (*Agreements or arrangements of federal financial institutions*), section 52 (*False or misleading representation*), section 53 (*Deceptive notice of winning a prize*) of the *Competition Act*, or
- e. section 239 (*False or deceptive statements*) of the *Income Tax Act*, or
- f. section 327 (*False or deceptive statements*) of the *Excise Tax Act*, or
- g. section 3 (*Bribing a foreign public official*), section 4 (*Accounting*), or section 5 (*Offence committed outside Canada*) of the *Corruption of Foreign Public Officials Act*, or
- h. section 5 (*Trafficking in substance*), section 6 (*Importing and exporting*), or section 7 (*Production of substance*) of the *Controlled Drugs and Substance Act*.

The Consultant also certifies that no one convicted under any of the provisions under a. or b. are to receive any benefit under a contract resulting from this Standing Offer, unless a pardon or a record suspension has been obtained or capacities restored by the Governor in Council, as defined in the Time Period subsection.

9. Foreign Offences

The Consultant also certifies that, within a period, as defined in the Time Period subsection, neither the Consultant nor any of the Consultant's Affiliates have been convicted of or have received a conditional or an absolute discharge, under any foreign offence that Canada deems to be of similar constitutive elements to the offences listed in these Integrity Provisions. Canada will also consider foreign measures declared by Canada to be similar in nature to the Canadian pardon, record suspension, or restoration of capacities by the Governor in Council.

10. Sub-consultants

The Consultant must ensure that subcontracts include Integrity Provisions no less favourable to Canada than those imposed in the resulting contract.

11. Non-application

For governments, as well as entities controlled by a government, including Crown corporations, the present Integrity Provisions are reduced to complying with article 750 of the *Criminal Code*, the Government Contract Regulations and the *Code of Conduct for Procurement*.

0000DA SUPPLEMENTARY CONDITIONS**SC 1 Language Requirements**

1. Communication between *Canada* and the *Consultant* shall be in the language of choice of the *Consultant* team, which shall be deemed to be the language of the *Consultant's* proposal.
2. The *Consultant's services* during construction tender call (such as addenda preparation, tenderers' briefing meetings, technical answers to questions by bidders) shall be provided expeditiously in both languages, as necessary.
3. The *Consultant's services* during construction shall be provided in the language of choice of the *Contractor*. The successful *Contractor* will be asked to commit to one or other of Canada's official languages upon award of the *Construction Contract* and, thereafter construction and contract administration services will be conducted in the language chosen by the *Contractor*.
4. Other required services in both of Canada's official languages (such as construction documentation) are described in detail in the Standing Offer Brief.
5. The *Consultant* team, including the Prime *Consultant*, Sub-Consultants and Specialists Consultants shall ensure that the *services* being provided in either language shall be to a professional standard.

SC 2 Federal Contractors Program for Employment Equity - Setting aside and Default by the Consultant

The Consultant understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Consultant and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Standing Offer and contract. If the AIEE becomes invalid, the name of the Consultant will be added to the "FCP Limited Eligibility to Bid" list. The imposition of such a sanction by ESDC may result in the setting aside of the Standing Offer and will constitute the Consultant in default as per the terms of the contract.

9998DA TERMS OF PAYMENT**TP 1 Fees**

1. Subject to the terms and conditions of the Standing Offer, and in consideration for the performance of the *Services*, Canada shall pay to the Consultant a sum of money calculated in accordance with the fee arrangements identified herein and in 2000DA.
2. The *Consultant's* fees are only payable when the *Consultant* has performed the *Services* as determined by the *Departmental Representative*. Payment in respect of a *Service*, or part of a *Service*, is not to be deemed a waiver of *Canada's* rights of set-off at law or under this Standing Offer for costs or expenses arising from default or negligence of the *Consultant*.
3. The maximum amount payable under a Call-Up, including fees and disbursements, shall not be exceeded, without the prior written authorization of the Contracting Authority.

TP 2 Payments to the Consultant

1. The *Consultant* shall be entitled to receive progress payments at monthly or other agreed intervals, subject to the limitations of the Call-up, if applicable. Such payments shall be made not later than the due date. The due date shall be the 30th day following receipt of an acceptable invoice.
2. An acceptable invoice shall be an invoice delivered to the *Departmental Representative* in the agreed format with sufficient detail and information to permit verification. The invoice shall also identify, as separate items:
 - (a) the amount of the progress payment being claimed for *Services* satisfactorily performed,
 - (b) the amount for any tax calculated in accordance with the applicable federal legislation, and
 - (c) the total amount which shall be the sum of the amounts referred to in TP 2.2(a) and TP 2.2(b).
3. The amount of the tax shown on the invoice shall be paid by *Canada* to the *Consultant* in addition to the amount of the progress payment for *Services* satisfactorily performed.
4. The *Departmental Representative* shall notify the *Consultant* within fifteen (15) *days* after the receipt of an invoice of any error or missing information therein. Payment shall be made not later than thirty (30) *days* after acceptance of the corrected invoice or the required information.
5. Upon completion of each Call-up, the *Consultant* shall provide a Statutory Declaration evidencing that all the *Consultant's* financial obligations for *Services* rendered to the *Consultant* or on the *Consultant's* account, in connection with the Call-up, have been satisfied.
6. Upon written notice by a *Sub-Consultant*, with whom the *Consultant* has a direct contract, of an alleged non payment to the *Sub-Consultant*, the *Departmental Representative* may provide the *Sub-Consultant* with a copy of the latest approved progress payment made to the *Consultant* for the *Services*.
7. Upon the satisfactory completion of all *Services*, the amount due, less any payments already made, shall be paid to the *Consultant* not later than thirty (30) *days* after receipt of an acceptable invoice, together with the Statutory Declaration in accordance with TP 2.5.

TP 3 Delayed Payment

1. If *Canada* delays in making a payment that is due in accordance with TP 2, the *Consultant* will be entitled to receive interest on the amount that is overdue for the period of time as defined in TP 3.2 including the day previous to the date of payment. Such date of payment shall be deemed to be the date on the cheque given for payment of the overdue amount. An amount is overdue when it is unpaid on the first day following the due date described in TP 2.1.
2. Interest shall be paid automatically on all amounts that are not paid by the due date or fifteen (15) days after the *Consultant* has delivered a Statutory Declaration in accordance with TP 2.5 or TP 2.7, whichever is the later.
3. The rate of interest shall be the *Average Bank Rate* plus 3 percent per year on any amount which is overdue pursuant to TP 3.1.

TP 4 Claims Against, and Obligations of, the Consultant

1. *Canada* may, in order to discharge lawful obligations of and satisfy lawful claims against the *Consultant* by a *Sub-Consultant*, with whom the *Consultant* has a direct contract, for *Services* rendered to, or on behalf of, the *Consultant*, pay an amount from money that is due and payable to the *Consultant* directly to the claimant *Sub-Consultant*.
2. For the purposes of TP 4.1 a claim shall be considered lawful when it is so determined:
 - (a) by a court of legal jurisdiction, or
 - (b) by an arbitrator duly appointed to arbitrate the said claim, or
 - (c) by a written notice delivered to the *Departmental Representative* and signed by the *Consultant* authorizing payment of the said claim or claims.
3. A payment made pursuant to TP 4.1 is, to the extent of the payment, a discharge of *Canada's* liability to the *Consultant* under a specific Call-up and will be deducted from any amount payable to the *Consultant* under any active Call-up.
4. TP 4.1 shall only apply to claims and obligations
 - (a) The notification of which has set forth the amount claimed to be owing and a full description of the *Services* or a part of the *Services* for which the claimant has not been paid. The notification must be received by the *Departmental Representative* in writing before the final payment is made to the *Consultant* and within one hundred twenty (120) days of the date on which the claimant
 - (1) should have been paid in full under the claimant's agreement with the *Consultant* where the claim is for an amount that was lawfully required to be held back from the claimant; or
 - (2) performed the last of the *Services* pursuant to the claimant's agreement with the *Consultant* where the claim is not for an amount referred to in TP 4.4(a)(1), and
 - (b) the proceedings to determine the right to payment of which shall have commenced within one year from the date that the notification referred to in TP 4.4(a) was received by the *Departmental Representative*.
5. *Canada* may, upon receipt of a notification of claim referred to in TP 4.4(a), withhold from any amount that is due and payable to the *Consultant* pursuant to a Call-up the full amount of the claim or any portion thereof.

6. The *Departmental Representative* shall notify the *Consultant* in writing of receipt of any notification of claim and of the intention of *Canada* to withhold funds pursuant to TP 4.5. The *Consultant* may, at any time thereafter and until payment is made to the claimant, post with *Canada*, security in a form acceptable to *Canada* in an amount equal to the value of the said claim. Upon receipt of such security *Canada* shall release to the *Consultant* any funds which would be otherwise payable to the *Consultant*, that were withheld pursuant to the provision of TP 4.5.
7. The *Consultant* shall discharge all lawful obligations and shall satisfy all lawful claims against the *Consultant* for *Services* rendered to, or on behalf of, the *Consultant* in respect of this Standing Offer at least as often as this Standing Offer requires *Canada* to discharge its obligations to the *Consultant*.

TP 5 No Payment for Errors and Omissions

The *Consultant* shall not be entitled to payment in respect of costs incurred by the *Consultant* in remedying errors and omissions in the *Services* that are attributable to the *Consultant*, the *Consultant's* employees, or persons for whom the *Consultant* had assumed responsibility in performing the *Services*.

TP 6 Payment for Changes and Revisions

1. Payment for any additional or reduced *Services* authorized by the Departmental Representative, prior to their performance, and for which a basis of payment has not been established at the time of execution of the Call-up, shall be in an amount or amounts to be determined by the Departmental Representative, acting reasonably, subject to these Terms of Payment.
2. Payment for additional *Services* not identified at the time of execution of the Call-up shall be made only to the extent that
 - (a) the additional *Services* are *Services* that are not included in stated *Services* in the Call-Up; and
 - (b) The additional *Services* are required for reasons beyond the control of the *Consultant*.

TP 7 Extension of Time

If, and to the extent that, the time for completion of the *Construction Contract* is exceeded or extended through no fault of the *Consultant* in the opinion of *Canada*, payment for the *Services* required for such extended period of the contract administration shall be subject to review and equitable adjustment by *Canada*.

TP 8 Suspension Costs

1. During a period of suspension of the *Services* pursuant to GC 7 of clause 0220DA, General Conditions, the *Consultant* shall minimize all costs and expenses relating to the *Services* that may occur during the suspension period.
2. Within fourteen (14) days of notice of such suspension, the *Consultant* shall submit to the *Departmental Representative* a schedule of costs and expenses, if any, that the *Consultant* expects to incur during the period of suspension, and for which the *Consultant* will request reimbursement.
3. Payment shall be made to the *Consultant* for those costs and expenses that, in the opinion of *Canada*, are substantiated as having been reasonably incurred during the suspension period.

TP 9 Termination Costs

1. In the event of termination of any Call-up pursuant to GC 8 of clause 0220DA, General Conditions, *Canada* shall pay, and the *Consultant* shall accept in full settlement, an amount based on these Terms of Payment, for *Services* satisfactorily performed and any reasonable costs and expenses incurred to terminate the Call-Up.
2. Within fourteen (14) days of notice of such termination, the *Consultant* shall submit to the *Departmental Representative* a schedule of costs and expenses reasonably incurred. The *Consultant* must ensure that it has mitigated its costs to the best of its ability.
3. Payment shall be made to the *Consultant* for those costs and expenses that in the opinion of *Canada* are substantiated as having been reasonably incurred after the date of termination.
4. The *Consultant* has no claim for damages, compensation, loss of profit, loss of opportunity, allowance or otherwise by reason of, or directly or indirectly arising out of, any action taken or termination notice given by *Canada* under GC8 Termination.

TP 10 Disbursements

1. Subject to any provisions specifically to the contrary in the Supplementary Conditions, the following costs shall be included in the fees required to deliver the consultant services and shall not be reimbursed separately:
 - (a) reproduction and delivery costs of drawings, CADD files, specifications and other Technical Documentation specified in the Standing Offer Brief;
 - (b) standard office expenses such as any photocopying, computer costs, Internet, cellular phone costs, long distance telephone and fax costs, including that between the *Consultant's* main office and branch offices or between the *Consultant's* offices and other team members offices;
 - (c) courier and delivery charges for deliverables specified in the Standing Offer Brief;
 - (d) plotting;
 - (e) presentation material;
 - (f) parking fees;
 - (g) taxi charges;
 - (h) travel time;
 - (i) travel expenses; and
 - (j) local project office.
2. Subject to any provisions specifically to the contrary in the Supplementary Conditions, the following disbursements reasonably incurred by the *Consultant*, that are related to the *Services* and approved by the *Departmental Representative*, shall be reimbursed to the *Consultant* at actual cost:
 - (a) reproduction and delivery costs of drawings, CADD files, specifications and other Technical Documentation additional to that specified in the Standing Offer Brief;

- (b) transportation costs for material samples and models additional to that specified in the Standing Offer Brief;
 - (c) project related travel and accommodation additional to that specified in the Standing Offer Brief shall be reimbursed in accordance with current National Joint Council (NJC) Travel Directive (<http://www.njc-cnm.gc.ca/directive/index.php?dlabel=travel-voyage&lang=eng&did=10&merge=2>); and
 - (d) other disbursements made with the prior approval and authorization of the Departmental Representative.
3. Disbursements shall be Project related and shall not include expenses that are related to the normal operation of the Consultant's business. The amounts payable, shall not exceed the amount entered in the Call-up, without the prior authorization of the Departmental Representative.

9999DA CONSULTANT SERVICES**CS 1 Services**

The *Consultant* shall perform the *Services* described herein and in any subsequent Call-up, in accordance with the terms and conditions of this Standing Offer.

CS 2 Standard of Care

In performing the services, the Consultant shall provide and exercise the standard of care, skill and diligence required by customarily accepted professional practices and procedures developed by professional bodies in the performance of the services at the time when and the location in which the *Services* are provided.

CS 3 Time Schedule

The *Consultant* shall:

- (a) submit in a timely manner to the *Departmental Representative*, for approval, a time schedule for the *Services* to be performed, in detail appropriate to the size and complexity of the Project, and in a format as requested by the *Departmental Representative*;
- (b) adhere to the approved time schedule and, if changes in the approved time schedule become necessary, indicate the extent of, and the reasons for such changes, and obtain the approval of the *Departmental Representative*.

CS 4 Project Information, Decisions, Acceptances, Approvals

- 1. The *Departmental Representative* shall provide, in a timely manner, project information, written decisions and instructions, including acceptances and approvals relating to the *Services* provided by the *Consultant*.
- 2. No acceptance or approval by the *Departmental Representative*, whether expressed or implied, shall be deemed to relieve the *Consultant* of the professional or technical responsibility for the *Services* provided by the *Consultant*.

CS 5 Changes in Services

The *Consultant* shall:

- (a) make changes in the *Services* to be provided for the Project, including changes which may increase or decrease the original scope of *Services*, when requested in writing by the *Departmental Representative*; and
- (b) prior to commencing such changes, advise the *Departmental Representative* of any known and anticipated effects of the changes on the *Construction Cost Estimate*, *Consultant fees*, *Project Schedule*, and other matters concerning the Project.

CS 6 Codes, By-Laws, Licences, Permits

The *Consultant* shall comply with all statutes, codes, regulations and by-laws applicable to the design and where necessary, shall review the design with those public authorities having jurisdiction in order that the consents, approvals, licences and permits required for the project may be applied for and obtained.

CS 7 Provision of Staff

The *Consultant* shall, on request, submit to the *Departmental Representative* for approval, the names, addresses, qualifications, experience and proposed roles of all persons, including principals, to be employed by the *Consultant* to provide the *Services* identified in the Call-up and, on request, submit any subsequent changes to the *Departmental Representative* for approval.

CS 8 Sub-Consultants

1. The *Consultant* shall:
 - (a) prior to any Call-up notify the *Departmental Representative* of any other sub-consultants with whom the *Consultant* intends to enter into agreements for part of the *Services* and, on request, provide details of the terms, and *Services* to be performed under the said agreements and the qualifications and names of the personnel of the *Sub-Consultants* proposed to be employed on any Call-up;
 - (b) include in any agreements entered into with sub-consultants such provisions of this Standing Offer as they apply to the *Sub-Consultants'* responsibilities; and
 - (c) upon written notice by a *Sub-Consultant*, with whom the *Consultant* has a direct contract, inform the *Sub-Consultant* of the *Consultant's* obligations to the *Sub-Consultant* under this Standing Offer.
2. The *Departmental Representative* may object to any *Sub-Consultant* within six (6) days of receipt of notification given in accordance with CS 8.1(a) and, on notification of such objection, the *Consultant* shall not enter into the intended agreement with the *Sub-Consultant*.
3. Neither an agreement with a *Sub-Consultant* nor the *Departmental Representative's* consent to such an agreement by the *Consultant* shall be construed as relieving the *Consultant* from any obligation under this Standing Offer or subsequent Call-ups, or as imposing any liability upon *Canada*.

CS 9 Cost Control

If the *services* required under a call-up are for a construction project, the following will apply:

1. Throughout Project development, the *Construction Cost Estimate* prepared by the *Consultant* shall not exceed the *Construction Cost Limit*.
2. In the event that the *Consultant* considers that the *Construction Cost Estimate* will exceed the *Construction Cost Limit*, the *Consultant* shall notify the *Departmental Representative* and
 - (a) if the excess is due to factors under the control of, or reasonably foreseeable by the *Consultant*, the *Consultant* shall, if requested by the *Departmental Representative*, and at no additional cost to *Canada*, make such changes or revisions to the design as may be necessary to bring the *Construction Cost Estimate* within the *Construction Cost Limit*; or
 - (b) if the excess is due to factors that are not under the control of the *Consultant*, changes or revisions may be requested by the *Departmental Representative*. Such changes or revisions shall be undertaken by the *Consultant* at *Canada's* expense, and the cost involved shall become an amount to be mutually agreed, prior to performance of the said changes or revisions.

3. If the lowest price obtained by bid process or negotiation exceeds the *Construction Cost Limit*, and if the excess is due to reasons within the control of, or reasonably foreseeable by the *Consultant*, the *Consultant* shall, if requested by the *Departmental Representative*, and without additional charge, be fully responsible for revising the Project scope and quality as required to reduce the construction cost and shall modify the construction documents as necessary to comply with the *Construction Cost Limit*.

2000DA CALCULATION OF FEES**CF 1 Fee Arrangement(s) for Services**

1. The fee to be paid to the *Consultant* for the *Services* pursuant to any Call-up, shall be determined by one or more of the following methods:
 - (a) Fixed Fee:
The fixed fee will be established by multiplying the applicable hourly rate(s) by the number of hours, negotiated and agreed to by the *Departmental Representative* and the *Consultant*.
 - (b) Time Based Fee to an Upset Limit:
An upset limit will be established by the *Departmental Representative*, and the *Consultant* will be paid for actual work performed using the applicable hourly rate(s) for such work.
2. Maximum Amount(s) Payable
The maximum amount(s) that applies (apply) to the *Services* to be carried out at the fixed hourly rates shall be as specified in the Call-up, which amount(s) shall not be exceeded without the prior authorization of the *Departmental Representative* with the approval of Canada.

CF 2 Payments for Services

1. Payments in respect of the fixed fee shall be made upon satisfactory performance of the *Services* but such payments shall not exceed the amount(s) as specified in the Call-up, for each *Service*.
2. Payments in respect of the time based fee arrangement shall be made upon satisfactory performance of the *Services* but such payments shall not exceed the amount(s) as specified in the Call-up, for each *Service*.
3. Progress payments, in respect of all fee arrangements, shall be made in accordance with TP 2 in clause 9998DA, Terms of Payment, of the Standing Offer, but such payments shall not exceed the value of the fee indicated for each *Service* under consideration.
4. If, for reasons attributable to the *Consultant*, a price cannot be obtained by a tender or negotiation within the *Construction Cost Limit*, or acceptable to the *Departmental Representative* for the award of the *Construction Contract*, the *Consultant* shall be entitled to receive payment for the tender call, bid evaluation and construction contract award *Services*, only when the requirements of CS 9.3, in clause 9999DA, Consultant Services and Departmental Responsibilities, have been met.

STANDING OFFER BRIEF

Full Interior Design Services for projects within the National Capital

Area in the Province of Ontario and Quebec

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PROJECT ADMINISTRATION(PA)

1. Project Administration (PA) for this Standing Offer is divided into three (3) sections as per the following:
 - PA 1: General Requirements;
 - PA 2: Roles and Responsibilities; and
 - PA 3: General Administration.
2. The requirements described in the PA sections that follow shall apply during all phases of project delivery and shall form part of each Call-Up.
3. For standards relating to the required services described in this standing offer, refer to the "Government of Canada Workplace 2.0 Fit-up Standards" and the standards set out therein shall be adhered to. It is critical that all requirements that are less than / exceed or are NOT part of the "Government of Canada Workplace 2.0 Fit-up Standards" be highlighted. Document and assist in the reconciliation of all requirements that are less than / exceed or are NOT part of the standards. All non-compliant components must respect the Government of Canada Fit-up Standards Approval and Governance process.
4. Reference shall also be made to "Doing Business with NCA", and the standards set out therein shall also be adhered to.

PA 1 GENERAL REQUIREMENTS

PA 1.1 General Project Objectives

Each Call-Up will elaborate on the specific objectives for individual projects however the following objectives will apply to all Call-Ups:

1. Ensure the project recommendations supports the goals, objectives, and parameters outlined in the fit-up agreement between the Client Department and PWGSC.
2. Ensure key initiatives for connectivity, and sustainable development among others (see PA 1.8: Reference Documents) are incorporated into the project in accordance with the following principles:
 - Maximum flexibility in terms of immediate and future use of space;
 - Incorporation of current technologies and innovative solutions for the total office environment while respecting the Government of Canada Workplace 2.0 Fit-up Standards;
 - Incorporation of design principles in project solutions;
 - Minimization of waste from construction demolition; and
 - Maximization of recycling of materials.

PA 1.2 Codes, By-Laws, Licenses, Permits

1. The Consultant shall provide the required deliverables in accordance with CS 6: Codes, By-Laws, Licenses, Permits. In cases of overlap, the most stringent shall apply.

PA 1.3 Language Requirements

1. The Consultant shall provide the required deliverables, in accordance with SC 2: Language Requirements. Bilingual services may be required for focus groups, presentations to upper management, functional program documents, construction drawings, specifications, addenda(s) and record drawings and will be defined at time of each Call-Up.

Note 1: When bilingual construction documents are required, separate construction documents shall be prepared for each official language.

Note 2: The languages are considered equal in status; neither is considered to be a translation of the other.

PA 1.4 Media

1. The Consultant shall ensure that no member of the Consultant Team shall discuss the project with any third party without the consent of the Project Manager, and all media inquiries shall be directed to the Project Manager.

PA 1.5 Risk Management

1. The Consultant shall provide risk management services from the beginning of the project to post-occupancy (refer to "Doing Business with NCA, Section 5 Time Management").
2. On a continuing basis, the Consultant shall advise the Project Manager of any changes that could affect the risk management strategy for the project (see RS 9.4: Risk Management Report).

PA 1.6 Scheduling

1. The Consultant shall provide scheduling services from the beginning of the project to post-occupancy in accordance with RS 1.4: Project Schedule.
2. On a continuing basis, the Consultant shall advise the Project Manager and A&ID Professional Technical Resource of any changes to the project schedule and revise the schedule as required.

PA 1.7 Cost Control

1. The Consultant shall provide cost management services from the beginning of the project to post-occupancy in accordance with RS 1.3: Cost Management Services, and CS 9: Cost Control.
2. These services shall include as a minimum architectural, interior design, mechanical, electrical, furniture and equipment, escalation, inflation contingency costs, cost advising, and cost control/reporting.
3. The Consultant shall provide costing advice for individual construction components and various design systems to ensure the project develops within prescribed cost limits. PWGSC considers life cycle costing a necessary and important part of this process.
4. The Consultant shall prepare 'A', 'B', 'C' and 'D' cost estimates using the format developed by the Canadian Institute of Quantity Surveyors for Elemental Cost Analysis (refer to "Doing

Business with NCA, Section 4 Classes of Construction Estimates used by PWGSC"). The cost estimates shall also clearly identify base building, fit-up and Client as indicated in the Government of Canada Fit-up Standards.

5. The Consultant shall be expected to assist PWGSC by responding to questions about project costs and alternative cost solutions.
6. The Consultant shall provide backup cost breakdown worksheets when requested by PWGSC.
7. On a continuing basis, the Consultant shall advise the Project Manager of any changes that could affect cost estimates prepared for the project.

PA 1.8 Reference Documents

1. The following documents can be accessed on the Publications page on the PWGSC Internet Site: <http://www.tpsgc-pwgsc.gc.ca/biens-property/publications-eng.html>
 - x Government of Canada Workplace 2.0 Fit-up Standards;
 - x PWGSC National CADD Standard;
 - x The Environmentally Responsible Construction and Renovation Handbook; National Construction, Renovation and Demolition (CRD) Non-hazardous Solid Waste Management Protocol;
 - x The Environmentally Responsible Green Office at a Glance.
 - x National Master Specification;
 - x Commissioning Policy
2. Other documents to be requested from the Project Manager include:
 - x Directive on Construction Occupational Health and Safety (007-2)

Note: Some of these documents are "living" documents. The most current version is to be used at the time of the Call-Up.

PA 2 ROLES AND RESPONSIBILITIES

PA 2.1 Coordination with PWGSC

1. The Project Manager assigned to the project is the Departmental Representative.
2. PWGSC, through the Project Manager, administers the project.
3. A PWGSC A&ID Professional Technical Resource shall be assigned to each project at the time of Call-Up. The A&ID Professional Technical Resource manages the design component of the work and deliverables during all phases. Additional roles and responsibilities of the A&ID Professional Technical Resource shall be established on a project basis at the time of Call-Up.

PA 2.2 Coordination with Sub-Consultants

1. The Consultant shall assume responsibility for coordinating the work of all

Sub-Consultants retained by the Consultant throughout the project in accordance with CS 8: Sub-Consultants.

2. The Consultant shall ensure clear, accurate and ongoing communication of concept, budget, risk and scheduling issues (including changes) as they relate to the responsibilities of all Sub-Consultants throughout the duration of the contract.

PA 2.3 Lines of Communication

1. The Project Manager is the liaison between the Consultant, PWGSC, and the Client Department and is the Consultant's prime contact for all project direction.
2. The Consultant shall correspond only with the Project Manager at all times and in the manner dictated by the Project Manager. The Consultant is however required to copy the A&ID Professional Technical Resource on all correspondence. The Consultant shall not communicate with the Client Department unless authorized in writing by the Project Manager.
3. The Consultant may be requested by the Project Manager to prepare a "Lines of Communication Chart" in a graphic format.

PA 2.4 Consultant

The Consultant is responsible for the following:

1. The Consultant shall carry out services in accordance with approved documents and directions given by the Project Manager.
2. The Consultant shall establish and maintain, throughout the duration of the standing offer, a Consultant Team capable of effectively delivering the services described in this document.
3. The Consultant Team shall provide the following services:
 - x Interior Design/Architectural;
 - x Mechanical Engineering;
 - x Electrical Engineering;
 - x Scheduling;
 - x Cost Control; and
 - x Sustainability.
4. The Consultant shall also be capable of providing the following additional services among others 'as and when required':
 - x Building Code;
 - x Fire Protection;
 - x Security;
 - x Structural Engineering;
 - x Acoustic;
 - x Communications/Data Engineering;
 - x Lighting Design;
 - x Wayfinding and Signage Design;
 - x Risk Management;
 - x Furniture inventory;

- x Ergonomics;
 - x Building Historian; and
 - x Audio Visual.
5. Prior to starting any project, the Consultant shall obtain the Project Manager's approval of other sub-consultant(s). Upon receipt of written confirmation from the Project Manager that the proposed sub-consultant(s) are acceptable, the Contracting Authority shall execute the Call-Up.
 6. Upon execution of the Consultant Call-Up, the Consultant shall demonstrate the availability of adequate resources within the Consultant Team to deliver the required deliverables in a timely and cost effective manner.
 7. The Consultant shall be responsible for gathering and identifying the functional requirements of the Client Department and incorporating those functional requirements into the required deliverables.
 8. The Consultant shall take into consideration all base building work and incorporate base building requirements likely to affect the project, into all the deliverables.
 9. The Consultant shall ensure experienced personnel provide site inspection services.
 10. The Consultant shall ensure all communications carry PWGSC's Project Title and Project Number.

PA 3 GENERAL ADMINISTRATION

PA 3.1 Meetings and Status Reports

1. The Project Manager shall arrange project team meetings throughout the project, on a regular basis and/or 'as required' for all members of the Project Team including as a minimum representatives from:
 - x PWGSC;
 - x Client Department; and
 - x Consultant and Sub-Consultants.
2. The Consultant shall attend the meetings, and ensure all Sub-Consultants attend as required throughout the various phases of the project.
3. The Consultant shall be required to make presentations as required to support the review and approval process.
4. The Consultant shall record the issues, decisions and action items (with responsibility) at each meeting and prepare and distribute meeting minutes within 48 hours of the meeting. Meeting minutes must clearly identify the status of the project (see RS 1.4: Project Schedule).
5. The Consultant shall prepare and distribute status reports on a monthly basis to the Project Manager.

Note: Number of project team meetings will be determined at time of Call-Up and will be

amended and negotiated throughout the duration of the project.

PA 3.2 Project Response Time Requirements

1. It is a requirement that the Consultant and their Sub-Consultants respond to inquiries within half (1/2) day of the Project Manager's request, and be available to attend meetings within one (1) day in the locality of the place of the work, from the date of the award of the Consultant Call-Up until final completion of the post-occupancy phase of the project.

PA 3.3 General Submission Requirements

1. The Consultant shall ensure all CADD drawings and specifications are prepared in accordance with "Doing Business with NCA" and PWGSC National CADD Standards (Refer to PA 1.8 Reference Documents). The Consultant shall also ensure that all CADD drawings are consistent in sheet size.
2. All deliverables, throughout the project, shall be reviewed and approved by representatives from:
 - x PWGSC (Project Manager and A&ID Professional Technical Resource) including in-house specialists as required;
 - x Authorities having jurisdiction as required; and
 - x Client Department.

3. The Consultant shall ensure all deliverables are reviewed and signed off by the Senior Level Design Consultant assigned to the project.

Note: The Project Manager shall not accept documents for review that have not been reviewed and signed off by the Senior Level Design Consultant assigned to the project.

4. Although acknowledging the Consultant's prerogative in design and aesthetics, the Project Manager has the right to appraise all deliverables and reject work considered to be incomplete, undesirable or not in keeping with the Government of Canada Workplace 2.0 Fit-up Standards.
5. The Consultant shall ensure all deliverables are submitted to the Project Manager for review, revised as required, and resubmitted for final approval prior to presentation to Client Department and prior to further action or implementation.
6. Typically and wherever requested to 'submit for review, revise as required, and resubmit for final approval' the Consultant shall be responsible for preparing a maximum of two (2) revisions per deliverable. Further revisions shall be considered additional services.

Note: Rejected deliverables shall be resubmitted at no additional cost and shall not be considered a revision.

7. During each review period the Consultant shall maintain full production on the project, and shall revise documents as necessary when review comments are received. The extent of revisions necessary shall depend largely on the quality and accuracy of the work submitted, and on the effectiveness of regular project meetings.
8. Reviews are not intended to indicate complete and detailed checks of documents, and do not

release the Consultant of their professional responsibility for reviewing their own work or that of their Sub-Consultants.

PA 3.4 Review and Approvals by Authorities Having Jurisdiction

1. The Consultant shall submit work for review and approval by – PWGSC Fire Protection Engineer and PWGSC Barrier-Free Specialist, among others, in accordance with the following:
 - x Submissions: see RS 3.2, RS 4.5 and RS 5.4;
 - x Submission schedule: provide ten (10) days notice to the Project Manager prior to each submission;
 - x Expected turnaround time: two (2) weeks;
 - x Number of submissions: until approval has been received.

PA 3.5 Number of Submissions and Format Required

1. Unless otherwise specified by the Project Manager, the Consultant shall provide:
 - x Six (6) hard copies of all documents with each submission, including as a minimum, summaries, reports, drawings, specifications, and/or schedules; and
 - x Two (2) in electronic format.

Electronic Format shall be:

 1. Native file according to the software that the documents were created in i.e. Microsoft Word, NMS Edit, AutoCAD;
 2. Portable Document Format (Adobe Acrobat.pdf).

Note 1: For each document submission:

One (1) hard copy shall be submitted to Project Manager;

One (1) hard copy shall be submitted to the Client;
and

Four (4) hard copies and two (2) in electronic format (one in native file format and one in portable document format) shall be submitted to the A&ID Professional Technical Resource.

Note 2: The Consultant, if required, shall provide additional copies.

Note 3: The cost of the six (6) hard copies and two (2) in electronic format (for each document submission) shall be included in the hourly rates. Additional copies shall be submitted as a disbursement.

Note 4: Pen assignments for AutoCAD will be provided to the Consultant by the A&ID Professional Technical Resource at time of call-up.

2. Electronic format shall mean, the most recent version of:

For written reports and studies:	MS Word (*.doc)
For spreadsheets and budgets:	MS Excel (*.xls)
For presentations:	MS Powerpoint
For drawings:	AutoCad (*.dwg)
For specifications:	Most recent version NMS Edit
3. The Consultant, if so requested by the Project Manager, shall also submit a legible copy of all research reports, design criteria and calculations used to develop the deliverables.

PA 3.6 Definitions

1. Base Building refers to the building shell including finished floors, exterior walls, interior core and demising walls, finished ceilings complete with lighting, and other building systems consistent with the designed function and planned general use of the building. In the case of office accommodation, for example, the base building would include exterior window coverings and primary identification signage.
2. Certificate of Completion (Final) means the certificates issued by the Project Manager following the final inspection by the Project Acceptance Board. Final payment to the Contractor by PWGSC is based on the final certificates of completion.
3. Certificate of Substantial Performance (Interim) means the certificates issued by the Project Manager following the Interim Inspection. Interim payment to the Contractor by PWGSC is based on the certificates. This payment takes the place of a regular progress claim.
4. Circulation means the space used, primarily by people, to move from one place to another. It includes major as well as minor aisles.
5. Co-location means placing items together for better organization.
6. Consolidation means reducing the number of co-located items by placing them in a common floor facility thereby eliminating duplication of space.
7. Deficiency refers to any item that is found at the time of inspection not to be in compliance with the approved Construction Drawings or that is not in compliance with applicable codes, standards or regulations. All costs to remedy deficiency items are the responsibility of the Contractor.
8. Discrepancy refers to any item that is requested by the Project Manager that has not been incorporated into the approved Construction or Furniture Installation Drawings.
9. Effective Project Approval (EPA) is sought at the Design Development Phase and normally permits the project team to proceed through the remaining stages without interruption. Unless circumstances change markedly before the start of construction, a project with an Effective Project Approval will get built.
10. Final Inspection means the inspection performed by the Project Acceptance Board once project has been completed and all deficiencies identified during the Interim Inspection have been corrected.
11. Fit-up means alterations and improvements required to prepare a facility for occupancy by a Client Department including any necessary changes to the base building and building systems.
12. Fit-Up Standards: Government of Canada Workplace 2.0 Fit-up Standards Manual is a resource to be used in the fit-up of office space for departments and agencies throughout the federal government. Its purpose is to review the circumstances surrounding the development of the renewed fit-up standards; identify the standards and provide examples to assist implementation; clarify funding accountabilities; and to explain PWGSC's approach to approvals and governance.

13. Floor Plate is the size and shape of the floor of a particular building.
14. Focus Groups means group sessions held to establish qualitative requirements, which cannot be easily identified through a survey. Focus groups are most effective at the strategic planning level. They are used primarily to translate the Client Department's mission statement into organizational requirements and to assess planning alternatives. The findings from the focus groups sessions are submitted in the form of meeting minutes.
15. FTE means full-time equivalent. It is a measure of labour utilization in the federal government, which approximates the actual number of persons "employed" by the government and includes indeterminate and term employees, exempt staff, appointees and CO-OP/COSEP students. Contractors, consultants and temporary personnel are not considered FTEs.
16. Furniture refers to and includes, but is not limited to the following items:
 - x All systems furniture powered and non-powered screens/panels and elements, accessories, accessory rails and components, fixed and/or mobile pedestals, work surfaces, overhead storage bins, bin dividers, shelves, task lighting, pencil drawers, keyboard trays, gables, power poles, tack boards and trims.
 - x Furniture suites
 - x Freestanding office suites
 - x Credenzas
 - x Collaborative furniture (seating, tables etc)
 - x Meeting room furniture
 - x Seating case goods
 - x Filing and storage components
 - x Other furniture as identified by the Departmental Representative/Client or PWGSC Project Manager.

Note: All existing and new furniture shall be considered part of the scope of work.

17. Furniture Installation Drawings refers to a set of technical drawings, which contain all of the required furniture, hardware and technical data to support the reconditioning, custom cuts and installation/reconfiguration of furniture.
18. General Administrative Offices are offices that accommodate general office functions and activities that do not require special security or other special features. General administrative offices do not have high interface with the public. These offices comprise the majority of PWGSC office space occupied by client departments and agencies.
19. Hardware refers to work surface supports, fasteners, brackets, screen/panel wall-mounts, screen/panel spacers, two-, three-, and four-way connectors, screen/panel draw rod connectors, base trim kits, screen/panel-to-screen/panel connectors, screws, bolts, hinges, lock cores, lock keys, coat hooks, casters, electrical and cabling raceways, electrical harnesses, electrical outlets, voice/data outlets and modules, glides, extenders, and any other component required to reconfigure or complete the installation of the furniture.
20. Non-compliant Fit-up Component is a client-requested fit-up item or service that exceeds the Government of Canada Fit-up Standards. The client department is accountable and responsible to provide both approval and funding for non-compliant components.

Any and all non-compliant items require the approval of the ADM (RPB), PWGSC, based on a formal request from the client department, authorized by its senior management, and accompanied by funding for the item(s). Client funding shall cover all costs related to the non-compliant item including on-going maintenance if maintenance requirements are expected to exceed the Government of Canada Workplace 2.0 Fit-up Standards.

21. **Project Acceptance Board** means a team assembled by the Project Manager to perform interim and final inspections of the Client Department's improvements.
22. **Record Drawings** are used to record field deviations, dimensional data, and changes or deviations from the 'Construction Documents-Issued for Construction' indicating the work as 'actually' installed. Record Drawings are prepared based on the As-built drawings.
23. **Refit** is the reuse of space currently occupied by the Client Department where the scope of work may include minor refinishing, furniture relocations or additions, minor modifications to power and communication systems, or minor demolition and construction.
24. **Rentable Area** is the space used to calculate rental payments. Rentable areas include usable areas and areas such as lobbies, washrooms and electrical rooms. Stairways, entrances and elevators or duct shafts are not included in rental areas.
25. **Schematic Design** means that phase of a fit-up project in which the fit-up guidelines and accommodation standards established as part of the functional program are further developed and refined through the preparation of schematic concept plans, colour schemes, vertical stacking, and horizontal zoning.
26. **Space Equation** means the preparation of a spreadsheet in a format that reflects the Client Department's organizational structure, functional requirements, and proposed planning alternatives and is used to determine the total usable m² * required to accommodate the following:
 - x Open and enclosed workstations/work settings;
 - x Support space;
 - x Special purpose space;
 - x Circulation factor;
 - x Building loss factor;
 - x Total population; and
 - x Total space required; and
 - x Summary by group.

The functional space equation identifies space requirements (in usable m²) by group along with a summary of the total space required for all groups.

*Space Equation to be prepared in accordance with the Government of Canada Workplace 2.0 Fit-up Standards – Space Calculator.

27. **Space Optimization** means the most effective means for maximizing the utilization of space.
28. **Special Purpose Space (SPS)** is space required by the client department or agency to accommodate specific activities that are essential to departmental programs. These spaces are typically non-recurring and are often not suitable for conversion to office accommodation

because of their special requirements.

They are NOT included in the support space calculation. Examples of special purpose spaces include as a minimum:

- x Laboratories, health units or clinics;
- x Meeting or training complexes which serve outside groups;
- x Processing space;
- x Departmental libraries;
- x Gymnasiums, warehouses;
- x File or storage areas other than as allowed by the Fit-up Standards;
- x Trade shops;
- x Mail rooms;
- x Computer training rooms;
- x Cash offices or similar spaces requiring special service and security features;
- x Hearing rooms.

29. Submission of Construction Documents means the following:
- x 66% Submission indicates substantial development of the project including well-advanced schedules, plans, details and specifications.
 - x 99% Submission represents complete Construction Documents ready for tender call.
 - x 100% Final Submission incorporates all revisions required by the 99% review and is intended to provide the Project Manager with complete set of Construction Documents for tender call.
30. Submission of Functional Program Document means the following:
- x Submission of a clear indication of format and direction of the document as outlined in RS 2.2: Functional Program Document of this standing offer;
 - x 50% Submission means substantial development of the subsections described in RS 2.2: Functional Program Document of this standing offer including well advanced recommendations for accommodation standards and fit-up guidelines for the Client Department;
 - x 99% Submission means consolidation of all of the required subsections described in RS 2.2: Functional Program Document of this standing offer;
 - x 100% Final Submission of Final Functional Program Document incorporates all revisions required by the 99% review along with the additional requirements described in RS 3.13: Final Functional Program Document and is intended to provide the Project Manager with a complete picture of the Client Department's accommodation standards, fit-up guidelines and current functional requirements.
31. Support Space means space for office support functions not included in workstations, workplace access or circulation space but necessary for office operation. Support space includes: interview rooms, training rooms, meeting rooms, boardrooms, lounges, lunchrooms and public-reading rooms, telecommunication and LAN rooms, libraries, mail rooms, storage rooms, waiting areas, reception areas, display areas and photocopy areas.
32. Usable Space is defined in square metres. The usable space, often referred to as the "walk on" space, is the space that is actually usable by the occupant. Measurement calculations do not include columns and convectors, building service areas and accessory areas.
33. Worksettings mean work environments that enhance on-the-job learning and support both collaboration and privacy. They include as a minimum: teaming areas, non-

dedicated workstations, privacy nooks, resource areas and multipurpose areas.

34. Workstations mean the area dedicated for the use of an individual employee and can be either enclosed or opened.

REQUIRED SERVICES (RS)

1. Required Services (RS) for this Standing Offer is divided into nine (9) sections as per the following:

RS 1: General Consultant Services;
RS 2: Functional Program;
RS 3: Schematic Design;
RS 4: Design Development;
RS 5: Construction Documents;
RS 6: Tender Call, Bid Evaluation & Construction Contract Award;
RS 7: Construction & Contract Administration;
RS 8: Post-Occupancy
RS 9: Additional Services
2. The requirements described in the RS sections that follow shall form all or part of each Call-Up.
3. The analysis and recommendations included in the RS sections that follow shall be developed in accordance with the principles set out in PA 1.8 Reference Documents.

RS 1 GENERAL CONSULTANT SERVICES

RS 1.1 Verification of Project Requirements

In a written report:

1. Confirm project objectives, parameters, and budget.
2. Confirm roles and responsibilities, lines of communication, and communication strategy for disseminating information.
3. Confirm decision-making processes within Client Department and PWGSC.
4. Establish submission requirements including requirements for presentations, review and approval processes to be followed, and time frames to be adhered to.
5. Obtain all available project information and verify the same for relevance and accuracy.
6. Identify any discrepancies and/or requirements for additional information, clarification, and/or direction in (1) to (5) above.

RS 1.2 Project Implementation Strategy

1. Prepare a detailed implementation strategy for the project that documents, in a report format, all tasks/activities, milestones, process for information gathering, development of required deliverables and for the effective delivery of the project.

2. Without limiting the generality of the foregoing, the implementation strategy shall include as a minimum all or part of the following depending on the Call-Up:
 - x Information gathering strategy;
 - x Move sequencing;
 - x Identification of swing space requirements;
 - x Furniture and equipment procurement strategy; and
 - x Construction strategy.
3. Identify who is responsible for each task/activity (e.g. PWGSC, Client Department, Consultant, etc.).
4. Cross-reference each task/activity with tasks/activities identified in the project schedule.
5. Submit for review. Revise as required. Resubmit for final approval.

RS 1.3 Cost Management Services

The purpose of cost planning and cost management is to assist in the accomplishment of project cost objectives. It is a continuous and interactive process involving planning, action, measurement, evaluation and revision.

1. The Consultant shall provide an interactive and continuous cost management service for all phases of the project, including the preparation of the Class 'D', 'C', 'B' and 'A' estimates. Cost management services to respect the Government of Canada Workplace 2.0 Fit-up Standards.
2. On an ongoing basis, the Consultant shall alert the Project Manager, in a written format, of potential cost overruns, cost savings, cost/quality modifications, scope change, or of any changes that could affect cost estimates prepared for the project. Identify the nature, reason and the total cost impact of all identified and potential cost variation.
3. Provide a cost advising and cost monitoring service. The Consultant should be prepared to present and defend the cost estimates and respond to questions about project costs and alternative cost solutions.
4. The Consultant shall provide recommendations to ensure the project fits within prescribed cost limits. When advising of the costs of alternative options, the Consultant shall use all available information to ensure a complete cost picture is available. PWGSC considers life cycle costing a necessary and important part of this process.
5. The consultant shall cross reference project cost estimates with PWGSC fit-up cost limit. Adequate explanation for increased estimated costs to be provided when these exceed the PWGSC Fit-up cost limit.
6. At the end of each delivery phase, provide a Milestone Report including the required Elemental Summaries, supported by backup cost breakdown worksheets, clearly detailing the process used in preparing the estimate. The detailed work sheets will be the prime basis on which estimates will be reviewed by PWGSC. Cost comparisons and cost reports identifying and explaining the differences between each succeeding cost estimate and their cost effect are also required.

A typical Milestone Report will contain as a minimum:

- x Project Estimate Summary;
- x Elemental Estimate Summary;
- x Estimate Back-up Details;
- x Basis for escalation, inflation and contingency calculations;
- x Assumptions;
- x Detailed measurement and pricing;
- x Outline description of estimate basis;
- x Description of information obtained and used in the estimate;
- x Listing of notable inclusions and exclusions;
- x Risk factors and related estimated costs;
- x Notes on past and forecast cost estimates and required reconciliation;
- x Reconciliation with the Government of Canada Workplace 2.0 Fit-up Standards;
- and
- x Any other relevant information.

7. Cost Management services shall include as a minimum architectural, interior design, mechanical, electrical, furniture and equipment, escalation, inflation and contingency costs.
8. The consultant shall fully coordinate all estimates and related approvals with the project schedule.

RS 1.4 Project Schedule

1. Prepare a project schedule that identifies, in a graphic format such as Critical Path Method (CPM), or Program Evaluation Review Technique (PERT), all activities, milestones including critical deadlines and drop dead dates, and deliverables required for the effective delivery of all phases of the project. Include time frames for submissions, reviews, and approvals (see PA 3.4: Review and Approval by Authorities Having Jurisdiction).

2. Submit project schedule for review. Revise as required. Resubmit for final approval.

Note: The original approved schedule shall be used as a "baseline" to monitor the progress of the project.

3. Monitor the critical path and deadlines for submissions, revisions and approvals throughout the project and update on a monthly basis. Advise the Project Manager of any changes that may affect schedule or budget, or are inconsistent with instructions or written approvals. Detail the extent and reasons for the changes, and obtain written approval from the Project Manager before proceeding.
4. Resubmit the revised project schedule at the end of each delivery phase for review. Revise as required. Resubmit for final approval.

Summary of Deliverables:

- RS 1.1 Verification of Project Requirement in written format.
- RS 1.2 Detailed Implementation Strategy in report or chart format.
- RS 1.3 Comprehensive summary or chart of potential cost overruns, cost savings, cost/quality

modifications, scope change etc.
RS 1.4 Project Schedule in graphic chart format.

RS 2 FUNCTIONAL PROGRAM

The purpose of RS 2: Functional Program is to ensure the Consultant has gathered sufficient information to analyze the Client Department's functional requirements, developed an understanding of the building(s) infrastructure, examined the planning alternatives described in RS 2.2.2, and applied the Government of Canada Fit-up Standards and PWGSC Workplace 2.0 Initiative. All of this information will be incorporated into the Functional Program Document (99%) (Refer to RS 2.2.13) which will be further updated in the next phase of the project, RS 3: Schematic Design.

RS 2.1 INFORMATION GATHERING

RS 2.1.1 Inventory and Assessment of Existing Furniture Report

1. Prepare a detailed furniture inventory including drawings of existing furniture layouts and a chart indicating counts of sizes of furniture/ furniture components, a description of existing finishes and colours, and an assessment of the condition of existing furniture for the following areas:
 - x Workstations/work settings;
 - x Support space; and
 - x Special purpose space.

Note: Furniture layouts described above shall include identification of existing location, and user's name or workstation number, if applicable.

2. Submit for review. Revise as required. Resubmit for final approval.

RS 2.1.2 Master Drawings

1. Verify on-site conditions by preparing or updating master drawings to scale and in an approved AutoCAD format as per "Doing Business with NCA" and the PWGSC National CADD Standard (refer to PA 1.8 Reference Documents). Ensure existing architectural/interior design, mechanical, electrical, structural and communication/data elements on underside of suspended ceilings among others are correctly indicated.
2. Submit for review. Revise as required. Resubmit for final approval.

RS 2.2 DEVELOPMENT OF FUNCTIONAL PROGRAM DOCUMENT

The Functional Program Document (99%) shall be submitted for review after the format is established and at 50% and 99% stages of completion (see PA 3.6: Definitions).

RS 2.2.1 Format of Functional Program Document

1. Develop the format for the Functional Program Document and draft 'Table of Contents'. Submission should also include as a minimum the

formatting for spreadsheets, cost estimates and reports.

2. Submit for review. Revise as required. Resubmit for final approval.

RS 2.2.2 Planning Alternatives Report

1. Based on the Government of Canada Workplace 2.0 Fit-up Standards, develop and describe, in a written and graphic format at the macro level, two (2) planning alternatives complete with a general description of how the standards are applied and a 'general look and feel' (at a preliminary level) of the space(s).

Note: The planning alternatives will be used in RS 2.2.2 to RS 2.2.12 inclusive to develop the Client Department's Functional Program Document (99%).

2. Submit as part of 50% and 99% review of Functional Program Document.

RS 2.2.3 Workstations Recommendations Report

1. Gather and document the Client Department's workstations requirements in a written and graphic format (Data Sheet) including all mechanical, electrical, telephone and data requirements.
2. Analyze information gathered and make recommendations for the development of workstations standards in accordance with the Government of Canada Workplace 2.0 Fit-up Standards and provide the following:
 - a. A comparative (i.e. quantitative and qualitative) analysis between current conditions and each of the proposed planning alternatives described in RS 2.2.2 in sufficient detail to facilitate selection by the Client Department;
 - b. A document indicating the effects of each of the proposed planning alternatives on the Client Department's mission statement, functional requirements, space allocation, and project budget;
 - c. Recommendations based on the Client Department's functional requirements and proposed planning alternatives, for layouts for each category of workstation required (including as a minimum furniture type, layout, panel screen height(s) and widths and power requirements);
 - d. A maximum of three (3) layouts for each category of workstation required;
 - e. Specific and detailed recommendations in a written and graphic format. Functional justification and rationale to be included.

Note: See RS 2.2.6: Preliminary Procurement Strategy for Furniture for reuse of existing furniture.

3. Submit as part of 50% and 99% review of Functional Program Document.

RS 2.2.4 Support Space Recommendations Report

1. Gather and document the Client Department's support space requirements in a written and graphic format (Room Data Sheet) including all mechanical,

electrical, telephone and data requirements.

Note: Requirements for off-site support spaces, if applicable, shall also be included.

2. Analyze information gathered and make recommendations for support space in accordance with the Government of Canada Workplace 2.0 Fit-up Standards and provide the following:
 - x Identification of opportunities for space consolidation;
 - x Detailed recommendations in a written and graphic format for each type of support space. Include functional justification and rationale.
3. Submit as part of 50% and 99% review of Functional Program Document.

RS 2.2.5 Special Purpose Space Recommendations Report

1. Gather and document the Client Department's special purpose space requirements in a written and graphic format (Room Data Sheet) including all mechanical, electrical, telephone and data requirements. Identify workflow requirements.

Note: Requirements for off-site special purpose spaces, if applicable, shall also be included.

2. Prepare a list of Special Purpose Spaces and seek the Project Manager's approval.
Provide justification and back-up information as required.
3. Analyze information gathered and make recommendations for each special purpose space and provide the following:
 - x A comparative (i.e. quantitative and qualitative) analysis between current conditions and future requirements in sufficient detail to facilitate selection by the Client Department;
 - x Options (e.g. space optimization, use of multipurpose spaces, etc.);
 - x The effects of options on the Client Department's mission statement, functional requirements, space allocation and project budget;
 - x Detailed recommendations in a graphic and written format. Functional justification and rationale to be included.
 - x A workflow diagram.
4. Ensure funding mechanism for any special purpose space has been identified. As required, provide justification regarding technical requirements and estimated fees related to the fit-up of special purpose spaces.
5. Submit as part of 50% and 99% review of Functional Program Document.

RS 2.2.6 Preliminary Furniture Procurement Strategy Report

1. Based on the parameters developed in conjunction with the Project Manager

and Client Department, examine the procurement strategies for furniture described in (2) below and assess their impact on the Client Department's functional requirements and proposed planning alternatives.

2. Include an examination and analysis of the following:
 - x Reuse/refurbishment of existing furniture versus procuring new furniture;
 - x Procurement process, including time frames, for the purchase of new furniture, and the reuse/refurbishment of existing furniture; and
 - x New furniture requirements, at a macro level (for budget purposes), including as a minimum new freestanding furniture, and new systems furniture including among others: type (e.g. deskung or screen hung system), layout (e.g. benching, L-shaped) panel height (e.g. work surface or seated privacy), and finishes (e.g. use of materials).
3. Prepare a furniture Class 'D' cost estimate that compares the reuse/refurbishment of existing furniture with the purchase of new furniture. The Class 'D' estimate is to indicate cost breakdown between PWGSC and Client Department costs, as per the Government of Canada Workplace 2.0 Fit-up Standards.
4. Make specific and detailed recommendations in a written format and graphic layout. Identify positive and negative impacts on overall space, time, budget and quality. Include functional justification and rationale.
5. Submit as part of 50%, and 99% review of the Functional Program Document.

RS 2.2.7 Communications/Data Recommendations Report

1. Prepare a report to document the Client Department's current and future communications/data requirements and the effect these may have on other functional requirements and proposed planning alternatives. Report to be in accordance with the Government of Canada Fit-up Standards, Technical Reference Manual and Telecommunications Infrastructure Highlights documents (see PA 1.8: Reference Documents).
2. Recommend all necessary modifications to the base building. Assess the impact of those modifications on overall space, time and budget.
3. Make specific and detailed recommendations. Include functional justification and rationale.
4. Coordinate work performed by Mechanical and Electrical sub-consultants and incorporate into the Communications/Data Recommendations Report.
5. Submit as part of 50% and 99% review of Functional Program Document.

RS 2.2.8 Security Recommendations Report

1. Prepare a report to document the Client Department's current and future security requirements and the effect these may have on other functional

requirements and proposed planning alternatives.

2. Coordinate with the Client Department's security representative and refer to the Threat Risk Assessment prepared by the RCMP.
3. Recommend any necessary modifications to the base building. Assess the impact of these modifications on overall space, time and budget.
4. Make specific and detailed recommendations. Include functional justification and rationale.
5. Coordinate work performed by Mechanical and Electrical sub-consultants and incorporate into Security Recommendations Report.
6. Submit as part of 50% and 99% review of Functional Program Document.

RS 2.2.9 Proximity Recommendations Report

1. Document the Client Department's current and future proximity requirements for staff (by person-to-person, group-to-group, section-to-section etc.), support spaces and special purpose spaces. Examine the effect these may have on other functional requirements and proposed planning alternatives and make recommendations.
2. As required, prepare work flow diagrams for support and/or special purpose spaces.
3. Prepare proximity diagram that documents Client Department's functional requirements in a graphic format. Prioritize level of importance for each proximity requirement identified.
4. Submit as part of 50% and 99% review of Functional Program Document.

RS 2.2.10 Preliminary Building Capability Recommendations Report

The intent of the Building Capability Report is to investigate, assess and analyze how well the building(s) meets Client requirements, and make recommendations to suit. This report should not be confused with a Building Condition Report (BCR) which identifies the capital improvement requirements necessary to maintain an asset at a specified level, throughout and at the end of a set planning horizon.

1. The Consultant shall assess the capability of the existing building infrastructure and systems including as a minimum architectural, interior design, mechanical, electrical, structural, communication/data, and security, to determine how well the building(s) meets Client requirements.
2. Prepare the Preliminary Building Capacity Report in reference to the Client Department's functional requirements and PWGSC's documents (see PA 1.8: Reference Documents). The report shall include as a minimum:
 - x Results of site investigations and review of the project;

- x Location and capacity of existing infrastructure and building systems including architectural/interior design, mechanical, electrical, structural, communications/data and security systems;
 - x Deferred maintenance; curable/incurable equipment obsolescence; design problems and deficiencies that are likely to affect the Client requirements;
 - x Identification of all deficiencies, potentials and constraints with the existing building systems to support the Client Department's functional requirements and proposed planning alternatives;
 - x Areas of concern including an assessment of their impact on space, time and budget; and
 - x Preliminary recommendations and alternative remedial measures for areas of concern.
3. Coordinate work performed by Mechanical and Electrical sub-consultants and incorporate into Functional Program Document (99%) and Preliminary Building Capability Report. Mechanical and electrical engineering services must be complete in that they identify all issues that will have a significant impact on the project.
 4. Submit as part of 50% and 99% review of Functional Program Document. Revise and update as required (see RS 3.9: Final Building Capability Report).

RS 2.2.11 Functional Space Equation

1. Prepare a detailed functional space equation (i.e. a spreadsheet) in a format that reflects the Client Department's organization structure, functional requirements, and proposed planning alternatives. The functional space equation shall identify space requirements (in m²) by group along with summary of the total space required for all groups for the following current and future requirements:
 - x Staff listings including as a minimum all full time and part time employees, students. List by person, group, section, division etc.;
 - x Open and enclosed workstations;
 - x Support space;
 - x Special purpose space;
 - x Circulation factor;
 - x Building loss factor;
 - x Total population; and
 - x Total space required; and
 - x Summary by group and Department
 - x Non-compliant versus compliant spaces.

Note: Requirements for on-site and off-site support and special purpose spaces, if applicable, shall also be included.

2. Evaluate the results of the functional space equation. Provide a gap analysis of space and funding as well as confirmation of SPS between the client requirements and the Government of Canada Fit-up Standards. Compare with the PWGSC space allocation numbers in a graphic chart format complete with clarifications as required and identification of any issues or concerns.

Note: The Project Manager will provide calculations for PWGSC Space Allocation numbers at the time of Call-Up.

3. Consultant to document all non-compliant items complete with justifications (provided by Client Department).
4. Submit as part of 50% and 99% review of Functional Program Document.

RS 2.2.12 Class 'D' Estimate

1. Prepare a Class 'D' estimate (Elemental Cost Analysis). Estimate shall be summarized in an agreed and consistent Elemental format, by discussion with the Project Manager.
2. Cost estimate is to include as a minimum Architectural, Interior Design, Mechanical and Electrical. Class 'D' estimate is to isolate and show separately the cost of base building costs, fit-up costs and Client costs (refer to the funding accountabilities identified in the Government of Canada Workplace 2.0 Fit-up Standards).
3. Submit as part of 50% and 99% review of Functional Program Document.

RS 2.2.13 Functional Program Document (99%)

1. Consolidate the above information, i.e. RS 2.2.1 to RS 2.2.12 inclusive, including sub-consultant work into the Functional Program Document (99%) as per the approved format (see RS 2.2.1: Format of Functional Program Document). The Functional Program Document at this phase consists of the consolidated 99% submission (refer to PA 3.5).
2. As required, document the following, as a minimum, the current and future functional requirements:
 - Sound control requirements;
 - Accessibility requirements;
 - Special ergonomic requirements;
 - Special environmental considerations;
 - Mechanical performance requirements;
 - Electrical performance requirements;
 - Structural performance requirements;
 - Security requirements; and
 - Additional special requirements i.e. lighting, signage

Note: The consultant shall submit the above for review and approval.

3. Identify key issues to be examined and further developed in the next phase of the project.

4. During the Functional Program phase and prior to proceeding to the Schematic Design phase, it is the consultant's responsibility to ensure that all requirements, which are NOT part of Government of Canada Workplace 2.0 Fit-up Standards, have been clearly identified. Assist PWGSC in the reconciliation and approval process for any and all non-compliant components.
5. Submit at the 50% and 99% stages of completion. As required, revise and update deliverables described in RS 2.2.1 to RS 2.2.12 inclusive.

Summary of Deliverables

- RS 2.1.1 Detailed existing furniture inventory including CADD drawings of existing furniture layouts, a description of existing finishes and colours and assessment of current condition.
- RS 2.1.2 Update electronic master drawings.
- RS 2.2 Comprehensive preliminary functional program document updated and resubmitted as per the approved schedule.
- Submit the format for functional program document and table of contents for approval at the 33% stage of submission.

As a minimum, the following are to be incorporated into the Functional Program document (99%):

- Planning Alternatives Report
- Detailed written and graphic recommendations (Data Sheet) for workstations/work settings include mechanical /electrical/telephone/data.
- Detailed written and graphic recommendations (Room Data Sheet) for support space include mechanical/electrical/telephone/data.
- Detailed written and graphic recommendations (Room Data Sheet) for special purpose space include mechanical/electrical/telephone/data.
- Preliminary Procurement Strategy for Furniture Report.
- Detailed written recommendations for communications/data.
- Detailed written recommendations for security.
- Detailed written and graphic recommendations for proximity.
- Detailed preliminary recommendations for building capability.
- Detailed space equation and gap analysis charts.
- Comprehensive non-compliant space summary page.
- Class 'D' estimate for architectural, interior design, mechanical and electrical.

Submitted as per the approved schedule.

RS 3 SCHEMATIC DESIGN

The purpose of RS 3: Schematic Design is to further develop and refine the Client Department's functional requirements and RS 2: Functional Program by developing schematic concept plans, colour schemes, vertical stacking and horizontal zoning plans along with final building capability report. This information will be incorporated into the Final Functional Program Document (see RS 3.13) and then used to assess project viability and, where applicable, guide future project delivery.

RS 3.1 Schematic Concept

1. Based on the Government of Canada Workplace 2.0 Fit-up Standards, prepare a maximum of two (2) schematic concept plans of one floor plate (or portion, depending on the allocated space).

Note: The schematic concept plans shall reflect the Client Department's overall functional requirements but not necessarily any particular group, division etc.

2. The schematic concept plans shall contain sufficient detail (including furniture) to graphically illustrate the fit-up standards and 'general look and feel' established in RS 2: Functional Program in order to facilitate selection by the Client Department of one (1) schematic concept plan for further development. The following shall be included:
 - x Identification of fixed (partition) elements including door swings;
 - x All circulation paths;
 - x Proposed workstation layouts for both enclosed and open areas;
 - x Support space for both enclosed and open areas;
 - x Special purpose spaces as required to illustrate the overall design strategy; and
 - x Identification of all areas including name, room numbers and size.
3. Provide a written justification and summary for each option including as a minimum: number of workstations and enclosed offices according to size and level, total number of end users, types and number of support spaces, types of special purpose spaces, percentage of circulation, percentage of building loss factor and percentage of open offices versus closed offices.

Note 1: The schematic concept plans shall reflect the space allocation, approved functional program and project budget (refer to fit-up costs m²/\$) outlined in the Government of Canada Workplace 2.0 Fit-up Standards.

Note 2: The plans shall be consistent with the building's configuration and systems including as a minimum: mechanical, electrical, structural, communications/data, security.

Note 3: The plans shall respect all standards, codes and key initiatives for connectivity and sustainable development among others.

4. Submit schematic concept documents for review. Revise as required. Resubmit for final approval pending review and approval by Authorities having Jurisdiction.

Note: The approved schematic concept plan shall be included in the Final Functional Program Document (see RS 3.13: Final Functional Program Document).

RS 3.2 Review and Approval by Authorities Having Jurisdiction

1. Submit approved schematic concept plans for review by Authorities having Jurisdiction including Fire Protection Engineers among others to ensure compliance with all applicable codes.
2. Revise plans as required and provide written response to comments received from Authorities having Jurisdiction.
3. Coordinate review and approval process by Authorities having Jurisdiction with Mechanical and Electrical sub-consultants and ensure written responses to comments are provided.

4. Resubmit plan(s) for final approval, as required.

Note: Refer to PA 3.4 Review and Approval by Authorities Having Jurisdiction.

RS 3.3 Vertical Stacking Plans

1. Prepare a maximum of three (3) vertical stacking plans per building based on the Client Department's approved functional program, proximity requirements, and space equation.
2. Submit for review. Revise as required. Resubmit for final approval.

Note: The approved vertical stacking plans shall be included in the Final Functional Program Document (see RS 3.13: Final Functional Program Document).

RS 3.4 Horizontal Zoning Plans

1. Prepare a maximum of three (3) horizontal zoning plans (i.e. block plans) per floor based on the Client Department's approved functional program, and vertical stacking.

Note: Include identification of all areas and location of all main circulation aisles, designation (in m²) and position level for workstations/work settings, and designation (in m²) for support spaces and special purpose spaces. Units, divisions etc. shall also be identified. Consultant also to provide a count of number of users per group and per floor.

2. Submit for review. Revise as required. Resubmit for final approval.

Note: The approved horizontal zoning plans shall be included in the Final Functional Program Document (see RS 3.13: Final Functional Program Document).

RS 3.5 Zoning (Bubble) Diagram

1. Prepare zoning (bubble) diagrams based on the Client Department's functional program, space allocation and horizontal zoning plans, for all spaces forming part of the Call-Up.
2. Zoning (bubble) diagrams are to include as a minimum the following:
 - x Identification and location of hard walls/partitions;
 - x Identification of primary and secondary circulation aisles;
 - x Identification of (group and position titles/position levels or names) and area designation (in m²) for workstations (by group/position names); and
 - x Identification and area designation (in m²) for support spaces and special purpose spaces.
3. Submit for review. Revise as required. Resubmit for final approval.

RS 3.6 Mechanical and Electrical Design Concept

1. Prepare mechanical and electrical design concept documents including Commissioning Plan in sufficient detail to illustrate the mechanical and electrical design concept and to demonstrate compliance with the project requirements and to verify that the department's functional

requirements are correctly interpreted during the design stage and that the building systems operate consistently at the peak efficiencies, under normal load conditions and within the specified energy budget. Develop (1) one alternative solution that accommodates the Client Department's requirements, respond to the existing building, its surrounding context and the project budget. Provide option analysis (with maximum of two (2) options) complete with life cycle cost analysis.

2. Design Concept and alternative solutions shall adhere to the Government of Canada Workplace 2.0 Fit-up Standards and other Government Standards (refer to PA 1.8 Reference Documents).
3. Prepare mechanical and electrical drawings to include analytical diagrams, schematic bubble diagrams, plans, elevations and sections. Perspective sketches may be requested.
4. Submit for review. Revise as required. Resubmit for final approval.

RS 3.7 Colour Boards

1. Develop two (2) colour schemes on illustration boards that further refine the 'general look and feel' described in the RS 2: Functional Program, and clearly demonstrate the intended use of materials including as a minimum architectural finishes, and finishes for furniture and furnishings.
2. In a written format, identify the colour, pattern, texture, name, manufacturer and reference number for each finish and colour identified.
3. Submit colour schemes and identification for review. Revise as required. Resubmit for final approval.

RS 3.8 Presentation Boards

1. Prepare the approved schematic concept plans, vertical stacking plans, horizontal zoning plans, and/or final furniture plans for presentation purposes.
Note: The presentation technique selected by the Consultant shall clearly communicate both the functional and aesthetic aspects of the proposed fit-up developed for the Client Department. All presentation boards shall be completed at an appropriate scale, mounted on boards, and colour rendered. Elevation and perspective views, as required, shall include human figures for scale.
2. Present the material to the Project Manager, A&ID Professional Technical Resource and the Client Department.
3. Submit comments from presentation(s), if any, in the form of meeting minutes.
4. Revise the presentation material, if required. Resubmit for final approval.

Note: The Consultant shall be capable of providing bilingual services (English and French) for the presentation.

RS 3.9 Final Building Capability Recommendations Report

1. Revise RS 2.2.10: Preliminary Building Capability Recommendations Report to update preliminary recommendations and alternative remedial measures for areas of concern and

include recommendations for any additional and necessary modifications/adaptations to the building systems to support the Client Department's approved functional requirements, schematic design, vertical stacking and horizontal zoning. Assess their impact on space, time and budget.

2. Coordinate work performed by sub-consultants (i.e. mechanical and electrical) and incorporate into final report.
3. Submit for review. Revise as required. Resubmit for final approval.

Note: The Final Building Capability Recommendations Report shall be included in the Final Functional Program Document (see RS 3.13: Final Functional Program Document).

RS 3.10 Preliminary Environmental Recommendations Report

1. In accordance with the key initiatives for connectivity and sustainable development (see PA 1.1: General Project Objectives, and PA 1.8: Reference Documents), prepare a Preliminary Environmental Recommendations Report to include the following:
 - x Strategy for integrated approach to design to ensure project is delivered in an environmentally responsible manner;
 - x Identification of local waste recycling programs for construction materials, and ongoing use;
 - x Recommendations for environmentally sound construction materials (renewable, recycled content, durable materials); and
 - x Energy and water efficiency in facilities (including heating, ventilation, lighting, low water consumption appliances, etc.)
2. Coordinate work performed by Mechanical and Electrical sub-consultants and incorporate into preliminary report.
3. Submit for review. Revise as required. Resubmit for approval.

RS 3.11 Furniture Procurement Report

RS 3.11.1 Procurement of Furniture through Public Tender

1. Develop a detailed furniture specification(s) that can be used to procure new furniture and/or refurbish existing furniture through the public tender process.
2. Submit for review. Revise as required. Resubmit for final approval.

RS 3.11.2 Procurement of Furniture through PWGSC Standing Offers and other Internal Processes

1. Furniture requirements described in this section shall be used to select a Furniture Manufacturer/Supplier for the project through the standing offer process or other government internal procurement methods i.e. e-purchasing.
2. The final approved furniture requirements shall be included in the Final Functional Program Document (see RS 3.13: Final Functional

Program Document).

RS 3.11.2.1 Freestanding Furniture

1. Provide generic requirements for new freestanding furniture to be procured through standing offers or other government internal procurement methods including as a minimum the following:
 - x Identification of furniture by type (i.e. single pedestal desk, credenzas, files, chairs, etc.);
 - x Dimensions;
 - x Total number of units;
 - x Typical layouts if applicable;
 - x Technical requirements if applicable;
 - x Finishes; and
 - x Associated unit price ranges and budget information.
2. Submit for review. Revise as required. Resubmit for final approval.

RS 3.11.2.2 Systems Furniture

1. Provide generic requirements for new systems furniture to be procured through the standing offer or other government internal procurement methods including as a minimum the following:
 - x Identification of furniture type (e.g. desking or panel hung systems etc.);
 - x Description of components (e.g. overhead bins, file pedestal etc.);
 - x Dimensions;
 - x Typical layouts;
 - x Total number of each layout type and/or total component count;
 - x Technical requirements (e.g. panel height(s), mobility, height adjustability, electrical requirements etc.);
 - x Finishes; and
 - x Associated unit price ranges and budget information.
2. Submit for review. Revise as required. Resubmit for final approval.

RS 3.11.2.3 Refurbishment of Existing Furniture

1. Provide a detailed inventory of existing furniture to be refurbished through the standing offer process including as a minimum the following:
 - x Identification of furniture by manufacturer and type (e.g. worksurfaces, desks, chairs, file cabinets etc.);
 - x Total number of units;
 - x Existing/new finishes; existing/new location; and
 - x Associated budget information.
2. Submit for review. Revise as required. Resubmit for final approval.

RS 3.12 Class 'C' Estimate

1. Prepare a Class 'C' estimate (Elemental Cost Analysis). Estimate shall be

summarized in a consistent Elemental format, as agreed to with the Project Manager.

2. Cost estimate is to include as a minimum, Architectural, Interior Design, Mechanical and Electrical. Class 'C' estimate is to isolate and show separately the cost of base building costs, fit-up costs and Client costs and further isolate and show separately the cost of individual building blocks and/or the required accommodation sections (refer to the funding accountabilities identified in the Government of Canada Workplace 2.0 Fit-up Standards).
3. Submit for review. Revise as required. Resubmit for final approval.

RS 3.13 Final Functional Program Document

1. Update the RS 2.2.13 Functional Program Document (99%) to include revisions to requirements and documents prepared during the Functional Program phase. Incorporate and adjust document based on services and deliverables prepared during the Schematic Design phase. All sub-consultant work is to be included and incorporated into the Final Functional Program Document.
2. When conflicting requirements or recommendations occur, provide an integrated and final recommendation together with adequate justification.
3. It is the consultant's responsibility to ensure that all requirements, which are NOT part of Government of Canada Fit-up Standards, have been documented prior to final approval. Assist PWGSC in the reconciliation and approval process for any and all non-compliant components.
4. Submit for review. Revise as required. Resubmit for final approval.

Summary of Deliverables

- RS 3.1 Maximum (2) Schematic Concept Plan of one floor plate.
- RS 3.2 Obtain Review and Approval by Authorities Having Jurisdiction.
- RS 3.3 Maximum (3) Vertical Stacking Plans of each floor.
- RS 3.4 Maximum (3) Horizontal Zoning Plans of each floor.
- RS 3.5 Zoning (Bubble) Plans.
- RS 3.6 Mechanical and Electrical Design Concept documents.
- RS 3.7 (2) Colour Schemes on presentation boards illustrating the intended look and feel and demonstrating the intended use of materials.
- RS 3.8 Presentation Boards indicating the approved schematic concept.
- RS 3.9 Detailed Final Building Capability Recommendations Report.
- RS 3.10 Preliminary Environmental Recommendations Report.
- RS 3.11 Furniture Procurement Report.
- RS 3.12 Class 'C' Estimate for Architectural, Interior Design, Mechanical and Electrical.
- RS 3.13 Final Functional Program Document (100%).

RS 4 DESIGN DEVELOPMENT

The purpose of RS 4: Design Development is to finalize the approved Client fit-up requirements developed in RS

3: Schematic Design by preparing preliminary and final partition/furniture plans, coordinating the final selection and procurement of furniture if required, update Commissioning Plan, and ensuring all of the aforementioned works with the general infrastructure of the building(s). The plans and recommendations developed in this section will be used to prepare construction drawings and specifications in the next phase of the project, i.e. RS 5 Construction Documents.

RS 4.1 Preliminary Partition/Furniture Plans (66% Complete)

1. Prepare preliminary partition/furniture plans that include as a minimum the following:
 - x Partition locations including door swings;
 - x Preliminary layouts for all furniture and furnishings in open and enclosed workstations/work settings, support space and special purpose space;
 - x Location and identification of equipment including as a minimum photocopiers, printers, fax machines;
 - x Identification of all room/areas including name, room number, size; and
 - x Identification of units, branches, divisions, groups.
2. Submit for review. Revise as required. Resubmit for final approval.

RS 4.2 Preliminary Furniture Manufacturer/Supplier Documents (66% Complete)

1. Review furniture manufacturer's requirements for all new furniture including freestanding and/or systems furniture, and equipment along with preliminary partition/furniture plans. As required, incorporate modifications to the furniture layout in RS 4.4 Final Partition/Furniture Plans.

RS 4.3 Furniture and Finishes Board(s)

1. Prepare furniture and finishes board(s) that clearly demonstrates the furniture and finishes selected for the project including as a minimum the following:
 - x Furniture and furnishings selected.
 - x Final approved colour scheme for walls, floors, ceilings, furniture and furnishings including a legend;
 - x Specialized lighting;
 - x Specialized details; and
 - x Hardware.
2. In a written format, identify the final approved colour scheme as a minimum for walls, floors, ceilings, millwork, furniture and furnishing items and indicate corresponding information as a minimum: quantity, manufacturer, style, colour, finishes and reference numbers etc.
3. Submit for review. Revise as required. Resubmit for final approval.

RS 4.4 Final Partition/Furniture Plans (99% Complete)

1. In addition to information provided on preliminary furniture plans, prepare final furniture plans that include as a minimum the following:
 - x Partition type;
 - x Final layout for all furniture and furnishings in open and enclosed workstations/work settings, support space and special purpose space;
 - x Special requirements (i.e. audio visual etc.);

- x Security requirements; and
 - x Identification of special mechanical and plumbing requirements.
2. Coordinate preparation and development of Final Partition/Furniture plan with Mechanical and Electrical sub-consultants.
 3. Provide Furniture CADD drawings in *dwg format which indicate one layer for each type of furniture. Provide as a minimum:
 - x New Freestanding – chairs, filing cabinets.
 - x New Systems – panels, work surfaces.
 - x Refurbishment of Existing Furniture – panels, work surfaces, chairs, desks.
 4. Submit for review. Revise as required. Resubmit for final approval pending review and approval by Authorities having Jurisdiction.

RS 4.5 Review and Approval by Authorities Having Jurisdiction

1. Submit final partition/furniture plans for review by Authorities having Jurisdiction including Fire Protection Engineers among others to ensure compliance with all applicable codes.
2. Revise plans as required. Provide written response to comments received from Authorities having Jurisdiction.
3. Coordinate review and approval process by Authorities having Jurisdiction with Mechanical and Electrical sub-consultants and ensure written responses to comments are provided.
4. Resubmit for final approval, as required.

Note: Refer to PA 3.4 Review and Approval by Authorities Having Jurisdiction.

RS 4.6 Review of Final Furniture Manufacturer/Supplier Documents (99% Complete)

1. Review Furniture Manufacturers/Suppliers installation plans for freestanding furniture, systems furniture and refurbishment of existing furniture. Ensure compliance with the approved furniture plans and the Client Department's functional requirements.

The Consultant to verify and confirm that all furniture installation drawings indicate, as a minimum, the following:

- x All furniture (including sizes and dimensions);
- x Quantities per floor, types and model numbers;
- x Furniture location and critical dimensions required to ensure a safe and proper assembly;
- x Finishes and fabric(s) specifications;
- x Indications of powered and non-powered screens/panels;
- x Coat hook;
- x Workstation and room numbers;
- x Employee names;
- x Electrical duplex outlets;
- x Telecommunication/data symbols;
- x Power harness requirements;

- x Lighting components requirements and specifications; and
- x Identification of custom cuts and retrofitting of work surfaces, panels and all other components as required, due to site condition interferences;
- x Conformance with all applicable codes, standards and regulations.
- x Conformance with the Government of Canada Fit-up Standards.

Note: The Consultant shall ensure that a competent individual with detailed, comprehensive, technical knowledge of all furniture and hardware verifies the specification and requirement for the new furniture and hardware.

2. Submit required information and comments for review. Ensure Final Furniture Manufacturer/Supplier Documents are revised as required. Resubmit for final approval.
3. The Project Manager will obtain written approval of the Furniture Installation drawings by the Client, prior to procurement, delivery and installation.
4. Coordinate furniture requirements and review with mechanical and electrical sub-consultants.
5. The Consultant shall review all quotations for new and refurbishment of furniture and hardware to ensure compliance with the quantities and types as identified on the approved required furniture and hardware plans.
6. Confirm if quotation is fair and reasonable and sign-off and stamp furniture manufacturer/supplier documents "Reviewed and Recommended".
Note: The consultant's signature shall be required for sign-off.

RS 4.7 Mechanical, Electrical and Communications/Data Plans

1. Based on final plans, Government of Canada Workplace 2.0 Fit-up Standards and the Client Department requirements, prepare mechanical, electrical and communications/data plans that identify the location and number of outlets required for both open and enclosed workstations/work settings, support spaces, and special purpose spaces.

Note: The electrical and communications/data plans shall include as a minimum, work surfaces for both open and enclosed workstations/ work settings, and room/area designations.

2. Submit for review. Revise as required. Resubmit for final approval pending review and approval by Authorities having Jurisdiction.
3. Coordinate preparation of Mechanical, Electrical and Communications/Data Plans with Mechanical and Electrical sub-consultants.

RS 4.8 Final Environmental Recommendations Report

1. Based on final approved furniture plans, review RS 3.9: Final Building Capability Recommendations and RS 3.10: Preliminary Environmental Recommendations Report for new opportunities for sustainable development.
2. Coordinate work performed by Mechanical and Electrical sub-consultants and incorporate

into final report.

3. As required, revise and update. Submit for review. Revise as required. Resubmit for final approval.

RS 4.9 Class 'B' Estimate

1. Prepare a Class 'B' estimate (Elemental Cost Analysis). Estimate shall be summarized in a consistent Elemental format, as agreed to with the Project Manager.
2. Cost estimate is to include as a minimum, costs for Architectural, Interior Design, Mechanical and Electrical. Class 'B' estimate is to isolate and show separately the cost of base building costs, fit-up costs and Client costs and further isolate and show separately the cost of individual building blocks and/or the required accommodation sections (refer to the funding accountabilities identified in the Government of Canada Workplace 2.0 Fit-up Standards).
3. Submit for review. Revise as required. Resubmit for final approval.

Summary of Deliverables

- RS 4.1 Preliminary Partition/Furniture Plans (per floor).
- RS 4.2 Review of Preliminary Furniture Manufacturer/Supplier Documents.
- RS 4.3 Furniture and Finishes Board(s).
- RS 4.4 Final Partition/Furniture Plans (per floor).
- RS 4.5 Obtain Review and Approval by Authorities Having Jurisdiction.
- RS 4.6 Review and Approval of Final Furniture Manufacturer/Supplier Documents.
- RS 4.7 Mechanical, Electrical and Communications/Data Plans.
- RS 4.8 Final Environmental Recommendations Report.
- RS 4.9 Class 'B' Estimate for Architectural, Interior Design, Mechanical and Electrical.

RS 5 CONSTRUCTION DOCUMENTS

The purpose of RS 5: Construction Documents is to prepare construction drawings and specifications in accordance with the final approved Client fit-up requirements developed for the Client Department in RS 4: Design Development. The consultant shall coordinate mechanical and electrical sub-consultant deliverables including Commissioning Plan. The construction drawings and specifications will be used by the Project Manager to obtain and evaluate bids in the next phase of the project, i.e. RS 6: Tender Call, Bid Evaluation & Construction Contract Award.

RS 5.1 General Requirements

1. The Consultant shall prepare construction documents in accordance with PA 1.3: Language Requirements and SC 2: Language Requirements.
2. Construction documents shall be submitted at the 66%, 99% and 100% stages of completion in accordance with PA 3.3 to PA 3.5 inclusive.

RS 5.2 Construction Drawings

1. Prepare construction drawings including all required architectural, mechanical,

electrical and structural drawings.

2. Architectural/Interior Design drawings shall include, as a minimum, the following:
 - X Title Sheet
 - X Demolition Plan
 - X Partition Plan
 - X Furniture Plan
 - X Reflected Ceiling Plan
 - X Wall Finishes Plan
 - X Floor Finishes Plan
 - X Elevations/Sections
 - X Detail/ Millwork Drawings; and
 - X Schedules.
3. Mechanical drawings shall be prepared in accordance with "Doing Business with NCA" and PA 1.8: Reference Documents and shall include as a minimum the following:
 - X Title Sheet;
 - X Demolition Plan;
 - X All mechanical systems including fire protection and layouts.
4. Electrical drawings shall be prepared in accordance with "Doing Business with NCA" and PA 1.8: Reference Documents and shall include as a minimum the following:
 - X Title Sheet;
 - X Demolition Plan;
 - X Lighting, controls and fire alarm systems; and
 - X Power layout and communications/data system;
5. Ensure mechanical and electrical engineers coordinate conduit space requirements with communications and security resources (including sub-consultants, PWGSC and Client Department). Ensure conduit requirements are indicated on electrical drawings.
6. Ensure mechanical and electrical engineers coordinate all security requirements with security resources (including Sub-Consultants, PWGSC and Client Department). Ensure all necessary power and/or HVAC requirements are indicated on mechanical and electrical drawings.

Note 1: When bilingual construction documents are required, separate construction documents shall be prepared for each official language.

Note 2: The languages are considered equal in status; neither is considered to be a translation of the other.

RS 5.3 Construction Specifications

1. Prepare construction specifications including Architectural/Interior Design, Mechanical and Electrical, in accordance with "Doing Business with NCA, Specifications in Section 3 Guide to Preparation of Construction Documents for PWGSC".

Note 1: When bilingual construction documents are required, separate construction documents shall be prepared for each official language.

Note 2: The languages are considered equal in status; neither is considered to be a translation of the other.

RS 5.4 Review and Approval by Authorities Having Jurisdiction

1. Submit construction documents for review by Authorities having Jurisdiction – Fire Protection Engineers among others to ensure compliance with all applicable codes.
2. Revise plans as required. Provide written response to comments received from Authorities having Jurisdiction.
3. Coordinate review and approval process by Authorities having Jurisdiction with Mechanical and Electrical sub-consultants and ensure written responses to comments are provided.
4. Resubmit for final approval.

Note: Refer to PA 3.4 Review and Approval by Authorities having Jurisdiction.

RS 5.5 Waste Management Report

1. Prepare a Waste Management Report in accordance with the Construction, Renovation and Demolition (CRD) Non-Hazardous Solid Management Protocol developed by PWGSC (see PA 1.8: Reference Documents).
2. Coordinate work performed by Mechanical and Electrical sub-consultants and incorporate into final report.
3. Submit for review. Resubmit as required. Submit for final approval.

RS 5.6 Class 'A' Estimate.

1. Prepare a Class 'A' estimate (Elemental Cost Analysis). Estimate shall be summarized in a consistent Elemental format, as agreed to with the Project Manager.
2. Cost estimate is to include, as a minimum, Architectural, Interior Design, Mechanical and Electrical. Class 'A' estimate is to isolate and show separately the cost of base building costs, fit-up costs and Client costs and further isolate and show separately the cost of individual building blocks and/or the required accommodation sections (refer to the funding accountabilities identified in the Government of Canada Workplace 2.0 Fit-up Standards).
3. Submit for review. Revise as required. Resubmit for final approval.

Summary of Deliverable

- RS 5.2 Cohesive construction drawings approved by PWGSC and Client department.
- RS 5.3 Cohesive construction specifications approved by PWGSC and Client department.
- RS 5.5 Waste Management Report
- RS 5.6 Class 'A' Estimate for Architectural, Interior Design, Mechanical and Electrical.

RS 6 TENDER CALL, BID EVALUATION & CONSTRUCTION CONTRACT AWARD

The purpose of RS 6: Tender Call, Bid Evaluation and Construction Contract Award service is to obtain and evaluate bids from qualified contractors to ensure the project is constructed in accordance with RS 5: Construction Documents.

RS 6.1 Tenderers' Briefing Meeting(s)

1. The Project Manager may call briefing meeting(s) to clarify requirements of a project.
Note: Questions arising from such meetings shall be answered by written addenda.
2. The Consultant and Sub-Consultants shall be required to attend such meetings.

RS 6.2 Documentation Interpretation

1. The Consultant shall provide the Project Manager with all information required by Tenderers to fully interpret the Architectural/Interior Design, Mechanical and Electrical Construction Documents.
2. The Consultant shall keep full notes of all inquiries during the bidding period and submit the same to the Project Manager at the end of the bidding period.

RS 6.3 Addenda

1. The Consultant shall prepare and coordinate Architectural/Interior Design, Mechanical and Electrical addenda when necessary (in an approved written format in both official languages), and submit the same to the Project Manager for issue by the contracting authority (see SC 2: Language Requirements and PA 1.3: Language Requirements). Copies of Addenda shall also be submitted to the A&ID Professional Technical Resource for reference.

Note 1: Time is of the essence.

Note 2: No addendum shall be issued orally.

2. The Consultant and sub-consultant shall examine and report on any cost and schedule impact created by the issue of tender contract addenda.

RS 6.4 Tender Evaluation by Consultant

1. If required, the Consultant and Sub-Consultants shall review and evaluate tenders and advise the Project Manager as to their acceptability.
2. If required, the Consultant and sub-consultant shall assist in tender evaluation by providing advice on the following:
 - x Completeness of tender documents in all respects;
 - x Technical aspects of the tenders;
 - x Effect of alternatives and qualifications which may have been included in the tender;
 - x Tenderers' capability to undertake the full scope of work.
3. If PWGSC decides to re-tender the project as a result of a deviation from the Class 'A'

estimate provided by the consultant, provide the following:

- x Advice and assistance to the Project Manager;
- x Revise and amend, at your cost, the construction documents to bring the cost of the work within the limits stipulated; and
- x Examine and report on any cost and schedule impact created by the issue of tender/contract addenda.

Summary of Deliverables

- RS 6.1 Clarify information or scope of work in written and/or illustrated format to successfully complete the implementation.
- RS 6.2 Provide notes on all inquiries from bidding period.
- RS 6.3 Provide Addenda(s) in written and/or illustrated format to successfully complete the implementation.
- RS 6.4 Review and assist in the evaluation of tenders, as required.
- RS 6.4 Revise construction documents, if re-tendering is necessary.
- RS 6.4 Report on the cost and schedule impact created by re-tendering.

RS 7 CONSTRUCTION & CONTRACT ADMINISTRATION

1. The purpose of RS 7: Construction and Contract Administration is to implement the project in accordance with the 'Construction Documents – Issued for Construction' (see RS 7.1) and to direct and monitor all necessary or requested changes to the scope of work during construction.
2. The consultant shall coordinate mechanical and electrical sub-consultant services including Commissioning Plan required for services listed under RS 7 Construction and Contract Administration.

RS 7.1 'Construction Documents – Issued for Construction'

1. Update the tendered Construction Documents to include any revisions.
2. Confirm in writing that all revisions have been integrated into the 'Construction Documents – Issued for Construction'.
3. Submit 'Construction Documents – Issued for Construction' in accordance with PA 3.3 to PA 3.5 inclusive to the following:
 - X two (2) hard copies to the Project Manager
 - X one (1) hard copy to the Contractor:
 - X one (1) hard copy to the Client; and
 - X two (2) hard copies and two (2) in electronic format to the A&ID Professional and Technical Resource.
4. Ensure the Contractor's copy is kept on site for use as record drawings.

RS 7.2 Construction Meetings

1. Immediately after Contract Award arrange a briefing meeting with the Contractor, the Client Department, the Project Manager and the A&ID Professional Technical Resource. Prepare

minutes of the meeting and distribute copies to all participants and to other persons agreed upon with the Project Manager.

2. Call construction meetings every week, commencing with the construction-briefing meeting. The meetings should include the job superintendent, Inspector of Construction, main sub-subcontractors, affected sub-consultants and Government Services representatives as necessary. Prepare minutes of the meetings and distribute copies to all participants. The Project Manager may invite the Client Department to attend any of these meetings.

Note: Number of construction meetings will be determined at time of Call-Up and will be amended and negotiated during the construction phase of the project.

RS 7.3 Construction Schedule

1. Obtain the Project Schedule with detailed Commissioning component shown separately, as soon as possible after contract award and ensure proper distribution to the project team.
2. Monitor the approved construction schedule and make all reasonable efforts to ensure that the schedule is maintained and to assist the Contractor to avoid delays.
3. Submit a detailed report concerning any delays and advise of any potential changes to project scope. Keep accurate records of causes of delays.

RS 7.4 Time Extensions

1. Only PWGSC may approve any request for Time Extensions. Approval will be issued in writing by the Project Manager.

RS 7.5 Site Inspections

1. Provide construction inspection services twice weekly to ensure compliance with 'Construction Documents – Issue for Construction'.
2. Provide services of qualified personnel who are fully knowledgeable with technical and administrative requirements of project.
3. Establish a written understanding with the Contractor as to what stages or aspects of the work are to be inspected prior to being covered up.
4. Assess quality of work, and identify in writing to the Contractor and the Project Manager all defects and deficiencies observed at the time of such inspections.
5. Inspect materials and prefabricated assemblies and components at their source or assembly plant, as necessary, for the progress of the project.
6. Any directions, clarifications and/or deficiency lists shall be issued in writing to the Project Manager.

RS 7.6 Testing

1. Prior to tender, provide the Project Manager with a recommended list of tests to be undertaken, including on site and factory testing.
2. Ensure all testing is detailed within Commissioning Plan.
3. When contract is awarded, assist the Project Manager in briefing testing firm on, as a minimum, required services, distribution of reports, communication lines.
4. Review all test reports and take necessary action with Contractor when work fails to comply with contract.
5. Immediately notify Project Manager when tests fail to meet project requirements and when corrective work will affect schedule.
6. Assist Project Manager in evaluating testing firm's invoices for services performed.

RS 7.7 Training

1. Prior to tender, provide the Project Manager with recommended list of training to be undertaken.
2. Ensure all training is detailed within the Commissioning Plan.

RS 7.8 Progress Reports

1. Report weekly in a written format to the Project Manager on the progress and quality of the work.

RS 7.9 Work Measurement

1. If work is based on unit prices, measure and record the quantities for verification of monthly progress claims and the Final Certificate of Measurement.
2. When the Contemplated Change Notice is to be issued based on Unit prices, keep accurate account of the work. Record dimensions and quantities.

RS 7.10 Clarifications/Detail Drawings

1. Provide clarifications on 'Construction Documents – Issued for Construction' and/or site conditions, as required, to ensure project is not delayed.
2. Provide additional detail drawings 'as and when requested' to clarify or interpret the 'Construction Documents – Issued for Construction'.

RS 7.11 Shop Drawings

1. Review and comment on all shop drawings.
2. Ensure shop drawings are stamped "Checked and Certified Correct for Construction" by the Contractor, and stamped "Reviewed and Approved" and signed by the Consultant before returning them to the Contractor.

3. On completion of the project, forward three (3) copies of the reviewed shop drawings in binder format to the Project Manager and (1) copy to the A&ID Professional Technical Resource. Ensure shop drawings include the project number and are recorded in sequence.

RS 7.12 Construction Changes

1. Upon approval by the Project Manager, obtain detailed quotations from the Contractor. Review prices and promptly forward recommendations to the Project Manager.
2. Prepare Contemplated Change Notices (CCNs) and Change Orders (COs).
3. The Project Manager will issue Consultant-prepared CCNs and Change Orders (COs) to the Contractor, with copy to the Consultant and A&ID Professional Technical Resource.
4. The Project Manager shall approve all Changes that affect cost or design.
5. Change Orders shall cover all changes, including those not affecting the cost of the project.
6. The practice of "trade offs" is not permitted.

RS 7.13 Cost Breakdown

1. Obtain from the Contractor detailed cost breakdown on the standard PWGSC form and submit to the Department with the first Progress Claim.

RS 7.14 Sub-Contractor Changes

1. The Contractor is required to use the sub-contractors listed on the tender form unless a change is authorized by PWGSC. Changes are only considered when they involve no increase in cost. Review all requests for changes of sub-contractors, and submit recommendations to the Project Manager.
2. When the sub-contractors have not been listed on the Tender Form, obtain the list from Contractors no later than ten (10) working days after date of award.

RS 7.15 Labour Requirements

1. The Contractor is bound by the Contract to maintain competent and suitable workers on the project and to comply with the Canada Department of Labour - Labour Conditions. Inform PWGSC of any labour situations that appear to require corrective action.
2. The Consultant shall ensure that a copy of the Labour Conditions for the Contract is posted in a conspicuous place on site.

RS 7.16 Construction Safety

1. All construction projects that are occupied by federal employees during construction are subject to the Canada Occupational Safety and Health Act and Regulations as administered by Health Canada and/or Provincial Regulations – whichever is more restrictive.

2. In addition to the above, the Contractor must comply with the provincial and municipal safety laws and regulations, and with any instructions issued by the officers of these Authorities having Jurisdiction relating to construction safety.
3. Ensure the Contractor is mandated to provide all required coordination, isolation, protection and reinstatement of the fire protection and suppression systems throughout construction. Notify the Property Manager each time the fire protection and suppression systems are bypassed and advise of estimated reinstatement time.

RS 7.17 Contractor's Progress Claims

1. Examine progress claims in a timely manner and, if acceptable, certify the progress claims for work completed and materials delivered pursuant to the construction contract.
2. Submit the progress claims to the Project Manager for approval and processing on a monthly basis.
3. Submit the following with each progress claim:
 - x Updated schedule of the progress of the work; and
 - x Photographs of the progress of the work.

RS 7.18 Materials on Site

1. The Contractor may claim for payment of material on site but not incorporated in the work. Materials must be stored in a secure place designated by the Project Manager.
2. A detailed list of materials with supplier's invoices showing the price of each item must accompany a claim. The Consultant shall check and verify this list (Material Identification Sheet).
3. Items shall be listed separately on the Material Identification Sheet after the breakdown list and total.
4. As material is incorporated in the work the cost must be added to the appropriate Detail item and removed from the Material Identification Sheet.

RS 7.19 Furniture Delivery, Installation, Inspections and Deficiency Lists

1. The Consultant shall coordinate the furniture and hardware deliveries and installation schedules to correspond with the Master Schedule and in consultation with the Project Manager and A&ID Professional Technical Resource.
2. The Consultant shall oversee installation of furniture by Furniture Manufacturer/Supplier. Provide instructions and/or resolve problems as and when required. Provide a detailed furniture and hardware tracking report in a spreadsheet or database format, compatible to the latest version of Microsoft Excel (or equivalent approved by the Project Manager). Furniture and hardware tracking report to be updated on a weekly basis and should include as a minimum the following:
 - x Scheduled delivery dates;

- x Anticipated and actual delivery dates;
- x List of furniture and hardware including finishes, sizes, manufacturer and product identification;
- x Quantities;
- x Location;
- x Scheduled inspections; and
- x Status i.e. deficiencies, acceptance.
- x Supplier information (contact name and number).

Note: Any changes to be approved by the Project Manager.

3. The Consultant shall receive and verify that all new furniture and hardware product received at an off-site storage facility and/or at the work site matches all packing slips and orders, and shall hand over the packing slips to the Project Manager.
4. The Consultant shall coordinate the delivery and installation of all furniture and hardware to coincide with the electrical and communication trades through the Project Manager.
5. Upon completion of the furniture and hardware installation for each floor, the Consultant shall ensure that:
 - x Screen/panel fabric and upholstered furniture is clean, without fabric flaws, tears, stains, sun damage or discolouration.
 - x Fabric is securely attached to all screens/panels without frayed edges, puckering and/or pulls;
 - x Furniture and hardware is clean, with no dents, scuffs, chips, scratches or exposed sharp edges;
 - x Plastic laminate surfaces are clean, with no scratches, chips or evidence of delamination;
 - x Plastic laminate edges are smooth, clean, sealed, free from dents, chips and scratches, with no exposed substrate visible;
 - x Operable furniture and hardware components are clean and in functional working order, including as a minimum: overhead storage bin mechanisms, keyboard tray articulating mechanisms, pedestal drawers, and light fixtures including lamps and ballasts.
6. The Consultant shall conduct furniture and hardware installation inspections with the Client, Construction Coordinator, Project Manager and A&ID Professional Technical Resource within one (1) week of the completion of furniture and hardware installations for each floor, and provide the Project Manager with a minimum of one (1) week notice to coordinate the inspection date and time. Inspections shall be scheduled on weekdays between the hours of 8 am and 4 pm, unless otherwise notified by the Client or Project Manager.
7. The Consultant shall prepare a Furniture and Hardware Deficiency/Discrepancy Inspection Report during the furniture and hardware installation inspections, to be signed-off by the Client at the end of each inspection. The report shall be prepared in a spreadsheet or database format, compatible to the latest version of Microsoft Excel (or equivalent approved by the Project Manager) to track all deficiencies and approved discrepancies to be implemented. The spreadsheet shall include as a minimum, the following identification:
 - x If the item is a Deficiency or a Discrepancy;
 - x If the item is a Discrepancy, whether it has been approved or rejected by the Departmental Representative;

- x Comprehensive description of the Deficiency/Discrepancy;
- x Date when the Deficiency/Discrepancy was observed (typically the inspection date);
- x Location of Deficiency/Discrepancy by floor and workstation/room number;
- x Action required [such as repaired/corrected during inspection, serviced on-site, removed and serviced off-site, ordering of part(s)];
- x Anticipated delivery date for part(s) ordered;
- x Anticipated completion date;
- x Actual completion date;
- x Actual completion date when the Client signs off that the Deficiency/Discrepancy is complete.

The Consultant shall also prepare a list of discrepancy items, which were noted or requested during the installation or inspection. The Consultant shall provide a copy of the signed off preliminary deficiency inspection report and list of the discrepancy items to the Project Manager and A&ID Professional Technical Resource at the end of each inspection.

8. Within forty-eight hours (48h) of each inspection, the Consultant shall provide a written response to the Project Manager and A&ID Professional Technical Resource relating to the management of discrepancies, indicating the impact on the cost, furniture schedule and quality of work, and await approval from the Project Manager prior to incorporating/implementing the change.
9. At a minimum the Consultant shall update the Furniture and Hardware Deficiency/Discrepancy Inspection Report on a weekly basis, after completing each furniture and hardware installation and shall ensure that the Furniture and Hardware Deficiency/Discrepancy Report remains accurate at all times. Provide to the Project Manager, A&ID Professional Technical Resource and Client for review, a hard copy of the completed itemized report, which relates only to the inspection area completed.
10. Project Manager shall review and provide written concurrence every week during the installation phase, that all items marked as completed on the Furniture and Hardware Deficiency/ Discrepancy Inspection Report have been rectified.

RS 7.20 Interim Acceptance

1. Inform the Project Manager when the project is substantially completed.
2. Attend all meetings of the Project Acceptance Board organized by the Project Manager.
3. Document all unacceptable and incomplete work identified by the Acceptance Board on the designated form provided by the Project Manager.

Note: The Acceptance Board shall accept the project from the Contractor subject to the deficiencies and incomplete work listed and priced.

RS 7.21 Certificate of Substantial Performance (Interim)

1. Examine certificates of substantial performance (interim) in a timely manner and, if acceptable, certify the interim inspection and certificate forms for work completed and material delivered pursuant to the construction contract.

Note: Payment requires completion and signing, by the parties concerned, of the following documents: Certificate of Substantial Performance, Cost Breakdown, Statutory Declaration and Workman's Compensation Clearance Certificate.

2. Submit the forms to the Project Manager for approval and processing.

RS 7.22 Operation and Maintenance Data Manual

1. Obtain (4) sets of each volume of the Operation and Maintenance Data Manual from the Contractor.
2. Operation and Maintenance Data Manual to be verified for completeness, relevance and format by the Interior Design/Architectural, Mechanical and Electrical Consultants and submitted to the PWGSC Project Manager prior to interim acceptance or actual start of operation and instruction period, whichever occurs sooner. The Contractor shall retain one copy of each volume for his record and use during the instruction period.

RS 7.23 Instruction of Operating Personnel

1. Make arrangements and ensure that PWGSC's operating personnel are properly instructed on the operation of all services and systems using the final manuals as reference.
2. Consultant to provide training sessions, as required, on the subject of design intent and systems operations. Utilize Systems Operation Manual for training sessions.

RS 7.24 Keys

1. Ensure that all keys and safe combinations are delivered to the Project Manager and/or Client as applicable.

RS 7.25 Final Inspection

1. Inform the Project Manager when all work under the contract, including the deficiency items, has been completed.
2. Attend all meetings of the Project Acceptance Board organized by the Project Manager.

Note: The Project Manager reconvenes the Project Acceptance Board which makes a final inspection of the project. If everything is satisfactory, the Board makes final acceptance of the project from the Contractor.

RS 7.26 Final Certificates

1. Examine Certificate of Completion (Final) in a timely manner and, if acceptable, certify the final certificate forms for work completed and materials delivered pursuant to the construction contract.

Note: Final payment requires completion and signing, by the parties concerned, of the following documents: Certificate of Completion (Final), Cost Breakdown,

Statutory Declaration, Workmen's Compensation Clearance Certificate and ESA (Electrical Safety Authority) Certificate.

2. Submit the final certificate forms to the Project Manager for approval and processing.

RS 7.27 Take-over

1. The official take-over of the project, or parts of the project, from the Contractor is established by the PWGSC Project Team which includes the Consultant and the Client. The date of Certificate of Completion (Interim) and the Certificate of Completion (Final) signifies commencement of the 12 month warranty period for work completed on the date of each certificate in accordance with the General Conditions of the Contract.
2. Provide the Project Manager with original copy of Contractor's warranties for all materials and work covered by an extended warranty or guarantee, according to the conditions of the specifications. Verify their completeness and extent of coverage.

RS 7.28 Warranty Inspections

1. Provide the Project Manager with original copies, in binder format, of the Contractor's warranties for all materials and work covered by extended warranty or guarantee according to the conditions of the specifications. Verify for completeness and extent of coverage.

RS 7.29 Final Warranty Review

1. During the Twelve (12) month warranty period, investigate all defects and alleged defects and issue instructions to the Contractor.
2. Conduct a final warranty review.

Summary of Deliverables

- RS 7.1 Cohesive construction documents issued for construction.
- RS 7.2 Construction meeting minutes on a weekly basis.
- RS 7.3 Detailed written report of delays or changes to project scope.
- RS 7.4 Identify stages or aspects of work to be inspected prior to being covered up (provide at start up of construction meeting).
- RS 7.5 Identify and conduct site inspections. Provide directions, clarifications and/or deficiency lists.
- RS 7.6 Provide list of tests to be undertaken. Assist in briefing testing firm after award. Review test reports and evaluate testing firm.
- RS 7.7 Training List
- RS 7.8 Written weekly progress updates.
- RS 7.9 Record of measurements and quantities of work based on unit prices.
- RS 7.10 Written and/or illustrated clarifications.
- RS 7.11 Binder of all approved shop drawings.
- RS 7.12 Written recommendation on contractor's quotation(s) for construction changes. Contemplated Change Notice(s) and Change Order(s).
- RS 7.13 Detailed cost breakdown with first progress claim.
- RS 7.14 Provide recommendations based on sub-contractors requests for changes.
- RS 7.15 Advise PWGSC of any labour situations. Ensure copy of Labour Conditions for the Contract is posted on site.

- RS 7.16 Ensure construction projects adhere to all applicable codes, acts and standards.
- RS 7.17 Progress Claims with noted certification/recommendation of claims and photographs.
- RS 7.18 Monitor and update Material Identification Sheet.
- RS 7.19 Coordination of furniture and hardware deliveries and installations; Instructions and/or resolve problems; Detailed Furniture and Hardware Tracking Report; Receive furniture and hardware and collect packing slips; Conduct furniture and hardware installation inspections and prepare Furniture and Hardware Deficiency/Discrepancy Inspections Reports.
- RS 7.20 Written notification of Certificate of Substantial Completion. Written document of unacceptable work for interim acceptance.
- RS 7.21 Examine and certify Certificates of Substantial Performance.
- RS 7.22 Written confirmation of completeness of operation and maintenance manual.
- RS 7.23 Provide training sessions on design and systems operations.
- RS 7.24 Provide all keys and safe combinations.
- RS 7.25 Written confirmation that all work under contract has been completed.
- RS 7.26 Examine and certify Certificates of Completion (Final).
- RS 7.27 Provide original copy of Contractor's warranties.
- RS 7.28 Binder of all warranties.
- RS 7.29 One year investigation report on warranty items.

RS 8 POST-OCCUPANCY

The purpose of RS 8: Post Occupancy is to ensure the record drawings described in RS 7 are updated and submitted to the Project Manager and that a Post Occupancy Evaluation Report (POE), if required, is prepared.

RS 8.1 As-Built and Record Drawings and Specifications

1. Immediately following issue of the Certificate of Completion (Final), obtain two (2) marked up hardcopies from the Contractor of the architectural/interior design, mechanical and electrical as-built drawings and specifications (labeled "As-Built").
2. Notify the Project Manager of any significant deviations in construction from the original Contract drawings, including changes shown on Post-Contract Drawings, changes resulting from Change Orders or from On Site Instructions.
3. Verify all as-built records for completeness and accuracy and submit to Project Manager.
4. Prepare Record Drawings by incorporating As-Built information into project drawings. Record drawings and specifications shall be labeled "Record Drawings" and signed and dated by the Senior Level Consultant assigned to the project.

Note: Consultant to ensure Record Drawings show all furniture etc.

5. Provide a complete set of final shop drawings in binder format.
6. Within six (6) weeks of the final acceptance, submit Record Drawings and Specifications (labeled "Record Drawing) and a complete set of final shop drawings to the following:
 - x one (1) hard copy to the Project Manager;

- x one (1) hard copy to the Client; and
- x one (1) hard copy and two (2) electronic non-PDF AutoCAD copies to the A&ID Professional Technical Resource.

Note 1: Record drawings and specifications shall be based on As-built drawings.

Note 2: The Consultant shall ensure all CADD drawings and specifications are prepared in accordance with "Doing Business with NCA" and the PWGSC National CADD Standards (Refer to PA 1.8 Reference Documents).

Note 3: Record drawings and specifications shall be prepared in both official languages in accordance with PA 1.3: Language Requirements.

Summary of Deliverables

RS 8.1 As-built Drawings and Record Drawings and a final set of shop drawings.

RS 9 ADDITIONAL SERVICES

The purpose of this section is to describe additional services that may be required 'as and when requested' by the Project Manager.

RS 9.1 Feasibility Study

1. Prepare a report that examines the viability and practicality of a project, where feasibility study services or deliverables are required above and beyond those described in RS 1 to RS 3.
2. Make detailed and specific recommendations. Provide analysis and justification as required.
3. Submit for review. Revise as required. Resubmit for approval.

RS 9.2 Verification of Functional Program

1. Review, update and/or complete Functional Program Document prepared by others. Refer to RS 2 Functional Program for list of services and deliverables.
2. Ensure content of Functional Program Document prepared by others includes deliverables described in RS 2.2: Development of Functional Program Document, and that the deliverables are complete and still current, i.e. up-to-date and approved by PWGSC and the Client Department.
3. Provide a detailed list of all requirements that exceed the Government of Canada Fit-up Standards. Assist PWGSC in the reconciliation and approval process for any and all non-compliant components.
4. Update the functional program deliverables as required. Submit for review. Revise as required. Resubmit for final approval.

RS 9.3 Verification of Schematic Design

1. Review, update and/or complete the Schematic Design deliverables prepared by others.

Refer to RS 3 Schematic Design for list of services and deliverables.

2. Ensure Schematic Design prepared by others includes the deliverables described in RS 3: Schematic Design, and that the deliverables are still current, i.e. up-to-date and are approved by the Client Department.
3. Provide a detailed list of all requirements that exceed the Government of Canada Fit-up Standards. Assist PWGSC in the reconciliation and approval process for any and all non-compliant components.
4. Update the schematic design as required. Submit for review. Revise as required. Resubmit for final approval.

RS 9.4 Risk Management Report

The purpose of a risk management is to identify, analyze and assist in responding to risk factors throughout the life of a project and in the best interest of its objectives.

1. Assist the Project Manager in the preparation of a Risk Management Report that identifies the positive and negative risk factors (internal and external), related probability (low, medium, high) and impact (low, medium or high risk). Impact of individual risk events are to be quantified and qualified in terms of time, cost or performance/quality.
2. The Risk Management Report is to include a risk management and response plan to define enhancement steps for opportunities, mitigate risks and respond to threats.
3. On a continuing basis, the Consultant shall manage risk factors and advise the Project Manager of any risks or changes that could affect the risk management and response plan. The consultant shall update the Risk Management Report at the end of each delivery phase.
4. The Risk Management Report format is to be determined by the Project Manager at the time of the Call-Up.
5. Submit for review. Revise as required. Resubmit for final approval.

RS 9.5 Test Plans

1. Develop two (2) plans of one (1) floor plate (or portion, depending on the size of the floor plate) in sufficient detail to test the viability of the workstations/work settings layouts and support space options being considered. Include special purpose space options as required.

Note 1: The test plans shall include circulation paths and shall provide a general indication of the 'general look and feel' (at a preliminary level) being proposed.

Note 2: The test plans shall reflect the Client Department's overall functional requirements but not necessarily any particular group, division etc.

2. Submit as part of 33%, 66% and 99% review of Functional Program Document.

RS 9.6 Presentation to Upper Management

1. Assist PWGSC to prepare a presentation to upper management of the Client

Department, to achieve an executive level of understanding of the project, to present progress status reports, obtain feedback, and/or seek approval.

2. Attend the presentation and provide all required assistance.
3. Submit the findings from the presentation in the form of meeting minutes. Revise as required. Resubmit.
4. The Consultant shall be capable of providing bilingual services (English and French) for all presentations to upper management.

RS 9.7 Employee Information Session

1. Assist PWGSC and the Client Department to prepare an information session for employees of the Client Department to explain the following:
 - x Goals and objectives of the project;
 - x Employee involvement;
 - x Communication strategy for disseminating project information; and/or
 - x Project schedule.
2. Attend the presentation and provide all required assistance.
3. Submit findings from the employee information session in the form of meeting minutes. Revise as required. Resubmit.
4. The Consultant shall be capable of providing bilingual services (English and French) for all employee information sessions.

RS 9.8 Focus Group Sessions

1. Prepare, coordinate and conduct focus group sessions with participants chosen by the Client Department, to assist in the information gathering process, and/or to assess the viability of proposed planning alternatives. Participants may include representatives from property management, human resources, labour relations, information technology, corporate communications, security and representatives from various divisions (i.e. directorates, branches, sectors, units etc.).
2. Submit findings from the focus group sessions in the form of meeting minutes. Revise as required. Resubmit.
3. The Consultant shall be capable of providing bilingual services (English and French) for all focus group sessions.

RS 9.9 Furniture and Finishes Binder

1. Prepare a Furniture and Finishes Binder for the Client Department's Facilities Group that includes a description of the following:
 - x Floors, walls and ceilings;
 - x Furniture and furnishings;
 - x Millwork;
 - x Specialized lighting; and

- x Hardware.
- 2. The description of (1) above shall include, as a minimum, the following:
 - x Specifications;
 - x Photographs and/or catalogue cuts;
 - x Samples;
 - and
 - x Maintenance instructions.
- 3. Submit for review. Revise as required. Resubmit for final approval.
- 4. Ensure the furniture supplier provides the Project Manager with an original copy of the warranties for all furniture and equipment covered by extended warranty or guarantee according to the conditions of the specifications. Verify for completeness and extent of coverage.

RS 9.10 'Highly Specialized Special Purpose Spaces'

- 1. Provide the services described in the Required Services (RS) section of this document as they pertain to the fit-up of special purpose spaces that far exceed a standard fit-up in terms of the complexity of the technical and/or functional requirements involved.
- 2. Submit for review. Revise as required. Resubmit for final approval.

RS 9.11 Related Public Spaces

- 1. Provide Functional Program and Schematic Design services described in the Required Services (RS) section of this document that are applicable to upgrading the base building outside the office space described in the Call-Up. These related public spaces might include, as a minimum, lobbies, washrooms, and/or elevator cabs. This does not include areas within the office fit-up space where higher interaction with the general public might occur (i.e. reception area, service counter).
- 2. Confirm project budget related to the fit-up of related public spaces and provide justification regarding functional and technical requirements along with Class 'D' and Class 'C' estimates.
- 3. Submit for review. Revise as required. Resubmit for final approval.

RS 9.12 Signage and Wayfinding

- 1. Provide the following services related to signage and wayfinding within the Client Department's office space and/or leading to their office space including as a minimum:
 - x Coordinate with PWGSC authorities responsible for Federal Identity Program;
 - x Prepare design concept options, design development, presentation(s) as required, and tender documents;
 - x Conduct site inspection; and
 - x Prepare deficiency report.
- 2. Submit for review. Revise as required. Resubmit for final approval.

RS 9.13 Window Treatments

1. Determine required window treatments.
2. Prepare specifications.
3. Obtain budget pricing.
4. Submit for review. Revise as required. Resubmit for final approval.
5. Prepare tender documents as required.
6. Conduct site inspection(s).
7. Prepare deficiency report.

RS 9.14 Post-Occupancy Evaluation Report

1. Develop a Post Occupancy Evaluation (POE) questionnaire or interview form. Submit for review. Revise as required. Resubmit for final approval.
2. Conduct interviews as required.
3. Document and analyze the information gathered.
4. Provide the Project Manager with a POE report.

Note: The POE report shall include as a minimum:

- x Level of Client Department satisfaction;
- x Level of achievement of project objectives; and
- x Lessons learned.

RS 9.15 Transfer of Information

1. The Consultant is required to present a formalized presentation/summary of their required services and deliverables in order to provide a historical context and a complete overview of the project parameters to the project team.
2. The Consultant shall provide the following deliverables, which will include as a minimum:
 - x A proposed agenda for review and approval by Project Manager and A&ID Professional Technical Resource;
 - x A written narrative/overview to identify and describe all significant factors which have influenced the decision-making process during the lifecycle of the project; and a briefing on the last document submission;
 - x After completion of the presentation, the written narrative/overview shall be submitted to the following:
 - one (1) hard copy to the Project Manager;
 - one (1) hard copy to the Client; and
 - two (2) hard copies and one (1) electronic non-PDF copy to the A&ID Professional Technical Resource.

RS 9.16 Additional Services

1. As required and requested by the Project Manager, provide additional services not identified in this standing offer and directly related to required services indicated in this document.

SUBMISSION REQUIREMENTS AND EVALUATION (SRE)SRE 1 GENERAL INFORMATION

SRE 1.1	Reference to the Selection Process
SRE 1.2	Submission of Proposal
SRE 1.3	Calculation of Total Score

SRE 2 PROPOSAL REQUIREMENTS

SRE 2.1	Requirement for Proposal Format
SRE 2.2	Specific Requirements for Proposal Format

SRE 3 SUBMISSION REQUIREMENTS AND EVALUATION

SRE 3.1	Mandatory Requirements
SRE 3.2	Rated Requirements
SRE 3.3	Evaluation and Rating

SRE 4 PRICE OF SERVICESSRE 5 TOTAL SCORE

SUBMISSION REQUIREMENTS AND EVALUATION (SRE)

SRE 1 GENERAL INFORMATION

1.1 Reference to the Selection Process

An 'Overview of the Selection Process' can be found in General Instructions (GI 9).

1.2 Submission of Proposal

The Proponent is responsible for meeting all submission requirements. Please follow detailed instructions in "Submission of Proposal", General Instructions (GI 10).

1.3 Calculation of Total Score

For this Standing Offer the Total Score will be established as follows: Technical

Rating x 90%	=	Technical Score (Points)
<u>Price Rating x 10%</u>	=	<u>Price Score (Points)</u>
Total Score		Max. 100 Points

SRE 2 PROPOSAL REQUIREMENTS

2.1 Requirement for Proposal Format

The following proposal format information should be implemented when preparing the proposal.

1. Submit one (1) bound original plus five (5) bound copies of the proposal.
2. Paper size should be - 216mm x 279mm (8.5" x 11").
3. Minimum font size - 11 point Times or equal.
4. Minimum margins - 12 mm left, right, top, and bottom.
5. Double-sided submissions are preferred.
6. One (1) 'page' means one side of a 216mm x 279mm (8.5" x 11") sheet of paper.
7. 279mm x 432 mm (11" x 17") foldout sheets for spreadsheets, organization charts etc. will be counted as two pages.
8. The order of the proposals should follow the order established in the Request for Standing Offer SRE Section.

2.2 Specific Requirements for Proposal Format

The maximum number of pages, including text and graphics, to be submitted for the Rated Requirements under SRE 3.2 is thirty-five (35) pages.

The following are not part of the page limitation mentioned above:

- Covering letter
- Declaration/Certification Form (Appendix A)
- Code of Conduct Certifications
- Consultant Team Identification Format (Appendix B)
- Letters of Reference as indicated in SRE 3.2.3, and RE 3.2.4 to be provided separately and to be restricted to eighteen (18) pages in total.
- Front page of the Request for Standing Offer Document
- Front page of revision(s) to the Request for Standing Offer Document
- Price Proposal Form (Appendix C)

Consequence of non-compliance: any pages which extend beyond the above page limitation and any

other attachments will be extracted from the proposal and will not be forwarded to the PWGSC Evaluation Board members for evaluation.

SRE 3 SUBMISSION REQUIREMENTS AND EVALUATION

3.1 MANDATORY REQUIREMENTS

Failure to meet the mandatory requirements will render the proposal as non-responsive and no further evaluation will be carried out.

3.1.1 Declaration/Certification Form(s)

Proponents must complete, sign and submit the following:
Appendix A Declaration / Certifications Form as required.

3.1.2 Licensing, Certification or Authorization

The Proponent shall be authorized to provide Interior Design or Architectural services and must include a registered Interior Designer or licensed Architect, or eligible to be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial or territorial law in the provinces of Ontario and Québec. If the Proponent is licensed to practise in only one of the two provinces then that Proponent must be eligible and willing to be licensed in the province in which they are not licensed.

You must indicate current license or how you intend to meet the provincial licensing requirements.

The Cost Specialist shall be a Professional Quantity Surveyor (PQS) as accredited by the Canadian Institute of Quantity Surveyors (CIQS).

3.1.3 Consultant Team Identification

The Proponent, key sub-consultants and specialist are to be identified.

Proponent (prime consultant) - Registered Interior Designer or Licensed Architect

Key Sub-consultants / Specialists	Mechanical Engineering
	Electrical Engineering
	Cost Specialist
	Scheduler
	Sustainability Specialist

If the Proponent proposes to provide multi-disciplinary services which might otherwise be performed by a sub-consultant, this should be reflected here.

Information required - name of firm, key personnel to be assigned to this Standing Offer. For the prime consultant and sub-consultants indicate current license and/or how you intend to meet the provincial licensing requirements. In the case of a joint venture identify the existing or proposed legal form of the joint venture (refer to General Instructions - Limitation of Submissions).

An example of an acceptable format (typical) for submission of the team identification information is provided in Appendix B.

3.1.4 Integrity Provisions – Associated Information

Proponents who are incorporated, including those submitting proposals as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Proponent. Proponents submitting proposals as sole proprietorship, including those submitting proposals as a joint venture, must provide the name of the owner. Proponents submitting proposals as societies, firms or partnerships do not need to provide lists of names. If the required names have not been received by the time the evaluation of proposals is completed, Canada will inform the Proponent of a time frame within which to provide the information. Failure to provide the names within the time frame specified will render the proposal non-responsive. Providing the required names is a mandatory requirement for issuance of a standing offer and award of a contract.

3.2 RATED REQUIREMENTS

Proposals meeting the mandatory requirements will be evaluated in accordance with the following criteria. The clarity of the proposal writing and the graphic presentation will form part of the evaluation (use of language, document structure, typography, illustration, conciseness and completeness of the response).

3.2.1 Comprehension of the Scope of Services

1. What we are looking for:
A demonstration of the understanding of the overall requirements for services, including specific deliverables, expected approaches, technical expectations, and coordination requirements, especially in delivering government projects.

3.2.2 Team Approach/Management of Services

1. What we are looking for:
How the Proponent team will be organized in its approach and methodology in the delivery of the Required Services.
2. What the Proponent should provide:
A description of:
 - a) Roles and responsibilities of key personnel;
 - b) Proponent Team's management and organization (reporting structure);
 - c) Organization chart with position titles and names. If applicable, joint venture business plan, and responsibilities;
 - d) Description of the Proponent's approach to responding to the individual call-ups which will arise as a result of this Standing Offer and the delivery of services;
 - e) Quality control techniques;
 - f) Cost control techniques;
 - g) Communication strategies;
 - h) Demonstration of how the team intends to meet the 'Project Response Time' Requirements;
 - i) Conflict Resolution; and
 - j) Involvement of Senior personnel in key positions from Proponent, sub-consultant and specialist, showing that they have a demonstrated track record of working together in

integrated teams.

3.2.3 Past Experience, Registered Interior Designer/Licensed Architect

1. What we are looking for:
Demonstration that over at least the past five (5) years the Proponent has participated in a range of projects requiring a full scope of services in accordance with the Required Services (RS) section. The Proponent's participation in these projects should have involved the scope of services listed in the Required Services (RS) section.

The projects should be comparable in terms of the dollar value of the maximum Call-Up limit of this particular standing offer. Projects involving special characteristics or design challenges should be noted.

2. What the Proponent should provide:
 - a) A brief description of a maximum of three (3) significant government or institutional projects undertaken within the last five (5) years by the firm and completed as a minimum, up to tender document stage. At least one project should be a study/report/ analysis type of project. At least one project should be an office and/or multi-purpose project.

For the above projects:
 - b) Include the names of senior personnel and project personnel who were involved as part of the project team and their respective roles and responsibilities;
 - c) Indicate the start-up date and completion date for the listed projects;
 - d) Total usable square metres;
 - e) Initial and final construction costs and explain the variance.
Note: For study/report/analysis projects, provide a Class 'D' Estimate only.
 - f) Scope of services rendered, project objectives, constraints and deliverables;
 - g) Design challenges and creative and innovative design solutions, especially those which demonstrate a holistic approach to workplace design;
 - h) Sustainable design experience;
 - i) Photographs or graphic illustrations;
 - j) Techniques used to ensure an effective consultative process;
 - k) Client references - name, address, phone and fax of Client contact at working level.
Reference checks may be completed if deemed necessary; and
 - l) An indication letter (or other) of Client satisfaction.

3.2.4 Past Experience, Sub-Consultants/Specialists

Mechanical and Electrical Sub-Consultants

1. What we are looking for:
Sub-consultants and specialists should demonstrate that, over at least the past five (5) years that they have participated in a range of studies/reports/analysis projects, and design and construction projects requiring a full scope of services in accordance with the Required Services (RS) section. The projects should be comparable in terms of the dollar value of the maximum Call-Up limit of this particular standing offer. Projects involving special characteristics or design challenges should be noted.

2. What the Proponent should provide:
 - a) For each sub-consultant/specialist, provide a brief description of a maximum of (2) significant projects with one (1) project being a government or institutional project and one (1) project being either a study/report/analysis type project or an office and/or multipurpose project.
Provide:
 - x (2) electrical engineering projects
 - x (2) mechanical engineering projects

For the above projects:
 - b) Include the names of senior personnel and project personnel who were involved as part of the project team and their respective roles and responsibilities;
 - c) Indicate the start date and the completion date for the listed projects;
 - d) Total usable square metres;
 - e) The initial and actual final construction costs of applicable discipline and explain the variance;
Note: For study/report/analysis projects, provide a Class 'D' Estimate only.
 - f) Scope of services rendered, project objectives, constraints and deliverables;
 - g) Design challenges and creative and innovative design solutions, especially those which demonstrate a holistic approach to workplace design;
 - h) Sustainable design experience;
 - i) Participation in efforts to ensure an effective consultative process;
 - j) Client references - name, address, phone and fax of Client contact at working level.
Reference checks may be completed if deemed necessary; and
 - k) An indication (letter or other) of Client satisfaction.

Cost, Scheduler, Sustainability Specialists

1. What we are looking for:
Sub-consultants and specialists should demonstrate that, over at least the past five (5) years that they have participated in a range of studies/reports/analysis projects, and design and construction projects requiring a full scope of services in accordance with the Required Services (RS) section. The projects should be comparable in terms of the dollar value of the maximum Call-Up limit of this particular standing offer. Projects involving special characteristics or design challenges should be noted.
2. What the Proponent should provide:
 - a) For each sub-consultant/specialist, provide a brief description of a maximum of (2) significant projects with one (1) project being a government or institutional project and one (1) project being either a study/report/analysis type project or an office and/or multipurpose project.
Provide:
 - x (2) cost specialist projects
 - x (2) scheduler projects
 - x (2) sustainability specialist projects

For the above projects:
 - b) Include the names of senior personnel and project personnel who were involved as part of the project team and their respective roles and responsibilities;
 - c) Indicate the start date and the completion date for the listed projects;
 - d) Total usable square metres;
 - e) The initial and actual final construction costs and explain the variance;
Note: For study/report/analysis projects, provide a Class 'D' Estimate only.
 - f) Scope of services rendered, project objectives, constraints and deliverables;
 - g) Design challenges and creative and innovative design solutions, especially those which

- h) demonstrate a holistic approach to workplace design;
- h) Sustainable design experience; and
- i) Participation in efforts to ensure an effective consultative process.

3.2.5 Key Personnel Expertise and Experience - Proponent Team

1. What we are looking for:
A demonstration that the Proponent team has senior and project personnel in-house with the capability, capacity and expertise in each area listed in the Required Services (RS) section.
2. What the Proponent should provide:
 - a) Submit a maximum of three (3) curricula vitae for the prime consultant, a maximum of three (3) curricula vitae for the mechanical engineering consultants and a maximum of three (3) curricula vitae for the electrical engineering consultants;
 - b) Submit one (1) curriculum vita, for the cost specialist, scheduler and sustainability specialist.
 - c) These curricula vitae must clearly indicate the years experience which each of the personnel has in the provision of the services specified in the Required Services (RS) section;
 - X Identify the personnel's years of experience in the profession and with the firm;
 - X Professional accreditation (if applicable);
 - X Accomplishments / achievements / awards.
3. In-house personnel means personnel within the Proponent's organization (see definition of Proponent in General Instructions GI 20). Past expertise and experience of personnel not within the Proponent's (or joint venture Proponent's) organization will not be considered in the evaluation.

PROJECT REQUIREMENT

3.2.6 Hypothetical Project

1. What we are looking for:
Describe the approach and methodology that you would employ to solve the problem(s) posed, in a written response only. State the overall philosophy and the way the services are to be delivered. We will assess the thoroughness of the firm's understanding and the suitability of the services offered by the firm to meet the scope of the problem.

The clarity of the report writing will form part of the evaluation (use of language, document structure, conciseness and completeness of the response).

2. What the Proponent should provide:
 - a) Project management approach to working with PWGSC (understanding of PWGSC management structure, Real Property Team/Client environment, Standing Offer (SO) Process, working with the government in general);
 - b) Identification of issues;
 - c) Problem solving methodology and creative design/planning approaches to solving issues;
 - d) Suggested resolutions;
 - e) Summary of your proposed work breakdown structure, i.e., Scope of Services.

3. The Facts:

When responding to the following hypothetical situation, be advised that the hypothetical is to be used for evaluation purposes only. All names and organizations are fictitious. Areas and details in the hypothetical are provided only to give the Proponent sufficient material from which to develop an outline of their approach and methodology to the resolution of the issues.

4. Hypothetical Project

Background

PWGSC requires a Registered Interior Designer/Licensed Architect to lead a team of consultants to provide full fit-up services for five (5) floors of a 35 year-old office building located in the downtown core of Ottawa. The building is a Crown asset.

The typical plate size is approximately 2200 m². There are 4 levels of below grade parking with approximately 100 spaces and one level of commercial/entrance lobby with 15 levels of general office above.

The Client is a federal government department of approximately 2000 employees where 13% are Leadership, 65% are fixed workers, 12% are flex workers and the balance are free workers. From this Department, three Branches are consolidating in this new location. The three are Legal Services, Programs Branch and the Public Affairs Branch. The Legal group has stated that they require a large boardroom with simultaneous translation and the Programs Branch has requested that their Team Leaders be allocated 9m² workstations.

Documentation

The following documentation is being made available:

- Building Capability Report;
- Global Threat and Risk Assessment;
- Departmental Functional Program; Space Equation for entire organization including proximities and special purpose spaces;
- As-built drawings; complete sets of original Architectural/Interior Design, M&E, Structural;
- Government of Canada Workplace 2.0 Fit-up Standards.

The Proponent may make assumptions in regards to the type and adequacy of information contained in the above documentation.

Requirement

The requirement is for the delivery of an Interior Design Fit-up Project.

5. Hypothetical Question

Find a creative approach to design the office space of the Federal Government Office. Outline the methodology and approach that your Firm/Team would propose for providing an innovative modern workplace that meets the Client's functional requirements while providing a safe, healthy and highly productive work environment. Describe the general look and feel of the proposed design. Your answer should demonstrate how well you know your Client (GOC).

Note: The proponent should create and state assumptions based on a hypothetical description and to demonstrate their abilities in monitoring a typical project schedule and to indicate that they understand how a project is delivered.

Prepare a Fees and Services Proposal (using the hourly rates listed below) for this Hypothetical Requirement which demonstrates an understanding of:

1. Underlying strategic importance of these deliverables;
2. GOC and PWGSC initiatives, goals, objectives and ways of doing business;
3. Methodology;
4. How/why your proposal will bring value to the Crown; and
5. How the PWGSC Consultant Standing Offer Call-Up process works.

The Proponent should address this as a two-part question:

1. Philosophical /Strategic Statement.
2. Fees & Services Proposal for SO Call-Up.

Assume a maximum total fee in accordance with SP4 and SP5.

Use the following hourly rates for all disciplines:

- | | | |
|----|--------------|----------|
| 1. | Principal | \$100/hr |
| 2. | Senior | \$75/hr |
| 3. | Intermediate | \$60/hr |
| 4. | Junior | \$50/hr |

Weight factor percentages in the Price Proposal Form are representative of what PWGSC would expect in terms of type of team structure for a typical project.

3.3 EVALUATION AND RATING

Proposals that are responsive (i.e. which meet all the mandatory requirements set out in the Request for Standing Offer) will be reviewed, evaluated and rated by a PWGSC Evaluation Board. In the first instance, price envelopes will remain sealed and only the technical components of the proposal will be evaluated in accordance with the following to establish Technical Ratings:

Criterion	Weight Factor	Rating (points)	Weighted Rating
GENERAL PRESENTATION			
3.2.1 Comprehension of the Scope of Services	0.5	0 - 10	0-5
PAST EXPERIENCE			
3.2.2 Team Approach/Management of Services	3.0	0 - 10	0-30
3.2.3 Past Experience, Interior Designer/ Architect	2.5	0 - 10	0-25
3.2.4 Past Experience, Sub-Consultants/Specialists	1.0	0 - 10	0-10
3.2.5 Proponent Team Structure	1.0	0 - 10	0-10
PROJECT REQUIREMENT			
3.2.6 Hypothetical Project	2.0	0 - 10	0-20
TOTAL	10.0		0-100

Generic Evaluation Table

PWGSC Evaluation Board members will evaluate the strengths and weaknesses of the Proponent's response to the evaluation criteria and will rate each criterion with even numbers (0, 2, 4, 6, 8 or 10) using the generic evaluation table below:

	INADEQUATE	WEAK	ADEQUATE	FULLY SATISFACTORY	STRONG
0 point	2 points	4 points	6 points	8 points	10 points
Did not submit information which could be evaluated	Lacks complete or almost complete understanding of the requirements.	Has some understanding of the requirements but lacks adequate understanding in some areas of the requirements.	Demonstrates a good understanding of the requirements.	Demonstrates a very good understanding of the requirements.	Demonstrates an excellent understanding of the requirements.
	Weaknesses cannot be corrected	Generally doubtful that weaknesses can be corrected	Weaknesses can be corrected	No significant weaknesses	No apparent weaknesses
	Proponent do not possess qualifications and experience	Proponent lacks qualifications and experience	Proponent has an acceptable level of qualifications and experience	Proponent is qualified and experienced	Proponent is highly qualified and experienced
	Team proposed is not likely able to meet requirements	Team does not cover all components or overall experience is weak	Team covers most components and will likely meet requirements	Team covers all components - some members have worked successfully together	Strong team - has worked successfully together on comparable projects
	Sample projects not related to this requirement	Sample projects generally not related to this requirement	Sample projects generally related to this requirement	Sample projects directly related to this requirement	Leads in sample projects directly related to this requirement
	Extremely poor, insufficient to meet performance requirements	Little capability to meet performance requirements	Acceptable capability, should ensure adequate results	Satisfactory capability, should ensure effective results	Superior capability, should ensure very effective results

To be considered further, proponents **must** achieve a minimum weighted rating of fifty (50) out of the hundred (100) points available for the rated technical criteria as specified above.

No further consideration will be given to proponents not achieving the pass mark of fifty (50) points.

SRE 4 PRICE OF SERVICES

All price proposal envelopes corresponding to responsive proposals, which have achieved the pass mark of fifty (50) points, are opened upon completion of the technical evaluation. An average price is determined by adding all the price proposals together and dividing the total by the number of price proposals being opened. All price proposals which are greater than twenty-five percent (25%) above the average price will be set aside and receive no further consideration.

The remaining price proposals are rated as follows:

1. The lowest price proposal receives a Price Rating of 100.
2. The second, third, fourth and fifth lowest prices receive Price Ratings of 80, 60, 40, and 20 respectively. All other price proposals receive a Price Rating of 0.
3. On the rare occasions where two (or more) price proposals are identical, the matching price proposals receive the same rating and the corresponding number of following ratings is skipped.

The Price Rating is multiplied by the applicable percentage to establish the Price Score.

SRE 5 TOTAL SCORE

Total Scores will be established in accordance with the following:

Rating	Possible Range	% of Total Score	Score (Points)
Technical Rating	0 - 100	90	0 - 90
Price Rating	0 - 100	10	0 - 10
Total Score		100	0 - 100

The proposals will be ranked in order from the highest to the lowest using the total score (technical plus price). The Proponents submitting the highest ranked proposals will be recommended for issuance of a Standing Offer. In the case of a tie, the Proponent submitting the lower price for the services will be selected. The Crown reserves the right to issue up to five (5) Standing Offers.

SRE 6 SUBMISSION REQUIREMENTS - CHECKLIST

The following list of documents and forms is provided with the intention of assisting the Proponent in ensuring a complete submission. The Proponent is responsible for meeting all submission requirements.

Please follow detailed instructions in "Submission of Proposals", General Instructions (GI 10).

- | | |
|--|--|
| <input type="checkbox"/> Declaration / Certifications Form | - completed and signed form provided in Appendix A |
| <input type="checkbox"/> Team Identification | - see typical format in appendix B |
| <input type="checkbox"/> Integrity Provisions – Associated Information | - list of directors / owners |
| <input type="checkbox"/> Proposal | - 1 original + 5 copies |
| <input type="checkbox"/> Front page of Request for Standing Offer | |
| <input type="checkbox"/> Front page of Revision(s) to a Request for Standing Offer | |

In a separate envelope:

- | | |
|--|--|
| <input type="checkbox"/> Price Proposal Form | - one (1) completed and submitted in a separate envelope |
|--|--|

APPENDIX A

DECLARATION/CERTIFICATIONS FORM

APPENDIX A - DECLARATION/CERTIFICATIONS FORM

Project Title: Standing Offer – Full Interior Design Services for projects within the National Capital Area in the Province of Ontario and Quebec

Name of Proponent:

Street Address:

Mailing Address:

Telephone Number: ()

Fax Number: ()

E-Mail:

Procurement Business Number:

Type of Organization: _____ Sole Proprietorship _____ Partnership _____ Corporation _____ Joint Venture	Size of Organization: Number of Employees _____ Graduate Architects / Professional Engineers _____ Other Professionals _____ Technical Support _____ Other _____
--	---

APPENDIX A - DECLARATION/CERTIFICATIONS FORM (CONT'D)

Former Public Servant (FPS) - Certification

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, proponents must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of proposals is completed, Canada will inform the Proponent of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the proposal non-responsive.

Definitions

For the purposes of this clause,

"former public servant" is any former member of a department as defined in the *Financial Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- (a) an individual;
- (b) an individual who has incorporated;
- (c) a partnership made of former public servants; or
- (d) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the *Public Service Superannuation Act* (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the *Supplementary Retirement Benefits Act*, R.S., 1985, c.S-24 as it affects the PSSA. It does not include pensions payable pursuant to the *Canadian Forces Superannuation Act*, R.S., 1985, c.C-17, the *Defence Services Pension Continuation Act*, 1970, c.D-3, the *Royal Canadian Mounted Police Pension Continuation Act*, 1970, c.R-10, and the *Royal Canadian Mounted Police Superannuation Act*, R.S., 1985, c.R-11, the *Members of Parliament Retiring Allowances Act*, R.S., 1985, c.M-5, and that portion of pension payable to the *Canada Pension Plan Act*, R.S., 1985, c.C-8.

APPENDIX A - DECLARATION/CERTIFICATIONS FORM (CONT'D)

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Proponent a FPS in receipt of a pension?

YES (☐) NO (☐)

If so, the Proponent must provide the following information, for all FPS in receipt of a pension, as applicable:

- (a) name of former public servant;
- (b) date of termination of employment or retirement from the Public Service.

By providing this information, proponents agree that the successful Proponent's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

Work Force Adjustment Directive

Is the Proponent a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? YES (☐) NO (☐)

If so, the Proponent must provide the following information:

- (a) name of former public servant;
- (b) conditions of the lump sum payment incentive;
- (c) date of termination of employment;
- (d) amount of lump sum payment;
- (e) rate of pay on which lump sum payment is based;
- (f) period of lump sum payment including start date, end date and number of weeks;
- (g) number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

APPENDIX A - DECLARATION/CERTIFICATIONS FORM (CONT'D)

Name of Proponent:

DECLARATION:

I, the undersigned, being a principal of the proponent, hereby certify that the information given on this form and in the attached proposal is accurate to the best of my knowledge. If any proposal is submitted by a partnership or joint venture, then the following is required from each component entity.

.....	
.....	
name	signature
.....	
title	
I have authority to bind the Corporation / Partnership / Sole Proprietorship / Joint Venture	
.....	
.....	
name	signature
.....	
title	
I have authority to bind the Corporation / Partnership / Sole Proprietorship / Joint Venture	
.....	
.....	
name	signature
.....	
title	
I have authority to bind the Corporation / Partnership / Sole Proprietorship / Joint Venture	

During proposal evaluation period, PWGSC contact will be with the following person:_____.

Telephone Number: () _____ Fax Number: () _____

E-mail: _____

This Appendix "A" should be completed and submitted with the proposal, but may be submitted afterwards as follows: if Appendix "B" is not completed and submitted with the proposal, the Contracting Authority will inform the Proponent of a time frame within which to provide the information. Failure to comply with the request of the Contracting Authority and to provide the certifications within the time frame provided will render the proposal non-responsive.

APPENDIX B

TEAM IDENTIFICATION FORMAT

APPENDIX B - TEAM IDENTIFICATION FORMAT

Project Title: Standing Offer – Full Interior Design Services for projects within the National Capital Area in the Province of Ontario and Quebec

For details on this format, please see SRE in the Request For Standing Offer.

The prime consultant and other members of the Consultant Team shall be, or eligible to be, licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial or territorial law.

I. Prime Consultant (Proponent – Interior Design/Architectural):

Firm or Joint Venture Name:
.....
.....

Key Individuals and provincial professional licensing status and/or professional accreditation:

.....
.....
.....
.....
.....

II. Key Sub Consultants / Specialists:

Mechanical Engineering

Firm Name:
.....
.....

Key Individuals and provincial professional licensing status and/or professional accreditation:

.....
.....
.....
.....
.....

Electrical Engineering

Firm Name:
.....
.....

Key Individuals and provincial professional licensing status and/or professional accreditation:

.....
.....
.....
.....

.....

APPENDIX B - TEAM IDENTIFICATION FORMAT (CONT'D)

Cost Specialist

Firm Name:
.....
.....

Key Individuals and provincial professional licensing status and/or professional accreditation:

.....
.....
.....
.....
.....

Scheduler

Firm Name:
.....
.....

Key Individuals and provincial professional licensing status and/or professional accreditation:

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.....
.....
.....

Sustainability Specialist

Firm Name:
.....
.....

Key Individuals and provincial professional licensing status and/or professional accreditation:

.....
.....
.....
.....
.....

APPENDIX C

PRICE PROPOSAL FORM

APPENDIX C - PRICE PROPOSAL FORM

INSTRUCTIONS: Complete this Price Proposal Form and submit in a **separate sealed envelope** with the Name of Proponent, Name of Project, PWGSC Solicitation Number, and the words "PRICE PROPOSAL FORM" typed on the outside of the envelope. Price Proposals are not to include Applicable Taxes.

PROONENTS SHALL NOT ALTER THIS FORM.

Title: Standing Offer – Full Interior Design Services for projects within the National Capital Area in the Province of Ontario and Quebec

Name of Proponent : _____

Address : _____

The following will form part of the evaluation process:

Interior Design/Architectural

Column	A	B	C	D	E
Category of Personnel	Weight factor %	Fixed Hourly Rates First & Second Year	A x B	Fixed Hourly Rates Third & Optional Fourth Year	A x D
Partners or principals of the firm	10 %	\$	\$	\$	\$
Senior Interior Designer/Architect	40 %	\$	\$	\$	\$
Intermediate Personnel	30%	\$	\$	\$	\$
Junior Personnel	15%	\$	\$	\$	\$
Administrative Support	5 %	\$25	\$	\$25	\$
SUBTOTALS			\$		\$
MULTIPLIED BY			66 %		34 %
TOTAL FOR EVALUATION PURPOSES			\$	+	\$
					= \$

Mechanical Engineering

Column	A	B	C	D	E
Category of Personnel	Weight factor %	Fixed Hourly Rates First & Second Year	A x B	Fixed Hourly Rates Third & Optional Fourth Year	A x D
Partners or principals of the firm	10 %	\$	\$	\$	\$
Senior Engineer	40 %	\$	\$	\$	\$
Intermediate Personnel	30%	\$	\$	\$	\$
Junior Personnel	15%	\$	\$	\$	\$
Administrative Support	5 %	25	\$	\$25	\$
SUBTOTALS			\$		\$
MULTIPLIED BY			66 %		34 %
TOTAL FOR EVALUATION PURPOSES			\$	+	\$
					= \$

Electrical Engineering

Column	A	B	C	D	E
Category of Personnel	Weight factor %	Fixed Hourly Rates First & Second Year	A x B	Fixed Hourly Rates Third & Optional Fourth Year	A x D
Partners or principals of the firm	10 %	\$	\$	\$	\$
Senior Engineer	40 %	\$	\$	\$	\$
Intermediate Personnel	30%	\$	\$	\$	\$
Junior Personnel	15%	\$	\$	\$	\$
Administrative Support	5 %	\$25	\$	\$25	\$
SUBTOTALS			\$		\$
MULTIPLIED BY			66 %		34 %
TOTAL FOR EVALUATION PURPOSES			\$	+	\$
					= \$

Cost Specialist

Column	A	B	C	D	E
Category of Personnel	Weight factor %	Fixed Hourly Rates First & Second Year	A x B	Fixed Hourly Rates Third & Optional Fourth Year	A x D
Partners or principals of the firm	30%	\$	\$	\$	\$
Senior Personnel	65%	\$	\$	\$	\$
Administrative Support	5 %	\$25	\$	\$25	\$
SUBTOTALS			\$		\$
MULTIPLIED BY			66 %		34 %
TOTAL FOR EVALUATION PURPOSES			\$	+	\$
					= \$

Scheduler

Column	A	B	C	D	E
Category of Personnel	Weight factor %	Fixed Hourly Rates First & Second Year	A x B	Fixed Hourly Rates Third & Optional Fourth Year	A x D
Partners or principals of the firm	30 %	\$	\$	\$	\$
Senior Personnel	65 %	\$	\$	\$	\$
Administrative Support	5 %	\$25	\$	\$25	\$
SUBTOTALS			\$		\$
MULTIPLIED BY			66 %		34 %
TOTAL FOR EVALUATION PURPOSES			\$	+	\$
					= \$

Sustainability Specialist

Column	A	B	C	D	E
Category of Personnel	Weight factor %	Fixed Hourly Rates First & Second Year	A x B	Fixed Hourly Rates Third & Optional Fourth Year	A x D
Partners or principals of the firm	30 %	\$	\$	\$	\$
Senior Personnel	65%	\$	\$	\$	\$
Administrative Support	5 %	\$25	\$	\$25	\$
SUBTOTALS			\$		\$
MULTIPLIED BY			66 %		34 %
TOTAL FOR EVALUATION PURPOSES			\$	+	\$
					= \$

Discipline	Weight Factor % (A)	Fixed Hourly Rates Total (B)	Total (A × B)
Interior Design/Architectural	50		
Mechanical Engineering	15		
Electrical Engineering	15		
Cost Specialist	10		
Scheduler	5		
Sustainability Specialist	5		
Total for Evaluation Purposes	100		

Signature of Consultant or Joint Venture Consultants

.....
Signature	Signature
.....
Title	Title
.....
Signature	Signature
.....
Title	Title

END OF PRICE PROPOSAL FORM

APPENDIX D - Doing Business with the National Capital Area (NCA)



Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

Canada



Serving
GOVERNMENT,
Serving
CANADIANS.

Doing Business with the National Capital Area (NCA)



www.pwgsc-tpsgc.gc.ca

Last updated: Apr 8, 2013

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Appendices

Appendix 'A'	Checklist for the Submission of Construction Documents
Appendix 'B'	Sample Addendum Format
Appendix 'C'	Sample Index for Drawings and Specifications
Appendix 'D'	User Manual on Directory Structure and Naming Conventions Standards for Construction Tender Documents on CDROM, dated May 2005
Appendix 'E'	Basic Reference Guide on Converting Construction Drawings into Portable Document Format (PDF), dated May 2005

SECTION 1 INTRODUCTION

This document must be used in conjunction with the Terms of Reference (TOR), as the two documents are complimentary. The TOR describes project-specific requirements while this document deals with information common to all projects. In case of a conflict between the two documents, the requirements of the TOR override this document.

SECTION 2 PWGSC NATIONAL CADD STANDARD

Drawings shall be in accordance with PWGSC National CADD Standards and Canadian Standards Association (CSA) B78.3.

Refer to:

<http://www.tpsgc-pwgsc.gc.ca/biens-property/cdao-cadd/index-eng.html>

The above link is subject to change. The Consultant shall check with the Project Manager to ensure that the link and related information are current and relevant with regards to PWGSC National CADD Standards.

SECTION 3 GUIDE TO PREPARATION OF CONSTRUCTION DOCUMENTS FOR PWGSC

1 Purpose

This document provides direction in the preparation of construction contract documents (namely specifications, drawings and addenda) for Public Works and Government Services Canada (PWGSC).

Drawings, specifications and addenda must be complete and clear, so that a contractor can prepare a bid without guesswork. Standard practice for the preparation of construction contract documents requires that:

- drawings are the graphic means of showing work to be done, as they depict shape, dimension, location, quantity of materials and relationship between building components.
- specifications are written descriptions of materials and construction processes in relation to quality, colour, pattern, performance and characteristics of materials, installation and quality of work requirements.
- Addenda are changes to the construction contract documents or tendering procedures, issued during the tendering process.

2 Principles of PWGSC Contract Documents

PWGSC's contract documents are based on common public procurement principles. PWGSC does not use Canadian Construction Document Committee (CCDC) documents.

The terms and conditions are prepared and issued by PWGSC as well as other related bidding and contractual documents. For information, the clauses are available on the following web site: <http://sacc.pwgsc.gc.ca/sacc/query-e.jsp>. Any questions should be directed to the Project Manager.

3 Quality Assurance

Consultants are required to undertake their own quality control process and must review, correct and coordinate (between disciplines) their documents before sending them to PWGSC.

SPECIFICATIONS

1 National Master Specification

The National Master Specification (NMS) is a master construction specification available in both official languages, which is divided into 48 Divisions and used for a wide range of construction and/or renovation projects. In preparing project specifications, the Consultant must use the current edition of the NMS in accordance with the "NMS User's Guide".

The Consultant retains overriding responsibility for content and shall edit, amend and supplement the NMS as deemed necessary to produce an appropriate project specification free from conflict and ambiguity.

2 Specification Organization

Narrowscope sections describing single units of work are preferred for more complex work, however, broadscope sections may be more suitable for less complex work. Use either the NMS 1/3 - 2/3 page format or the Construction Specifications Canada full-page format.

Start each Section on a new page and show Project Number, Section Title, Section Number and Page Number on each page. Specification date, project title, and consultant's name are not to be indicated.

3 Terminology

Use the term "Departmental Representative" instead of Engineer, PWGSC, Owner, Consultant or Architect. "Departmental Representative" means the person designated in the Contract, or by written notice to the Contractor, to act as the Departmental Representative for the purposes of the Contract, and includes a person, designated and authorized in writing by the Departmental Representative to the Contractor.

Notations such as: "verify on site", "as instructed", "to match existing", "example", "equal to" or "equivalent to", "to be determined on site by "Departmental Representative", should not be indicated in the specifications as this promotes inaccurate and inflated bids. Specifications must permit bidders to calculate all quantities and bid accurately. If quantities are impossible to identify (i.e. cracks to be repaired) give an estimated quantity for bid purposes (unit prices). Ensure that the terminology used throughout the specifications is consistent and does not contradict the applicable standard construction contract documents.

4 Dimensions

Dimensions are to be in metric only (no dual dimensioning).

5 Standards

As references in the NMS may not be up to date, it is the responsibility of the consultant to ensure that the project specification uses the latest applicable edition of all references quoted. The following is a list of some of the Internet websites which provide the most current publications of standards for reference in the construction specification document.

- CSA standards: <http://www.csa.ca>
- CGSB standards: <http://www.pwgsc.gc.ca/cgsb>
- ANSI standards: <http://www.ansi.org>
- ASTM Standards: <http://www.astm.org>
- ULC standards: <http://www.ulc.ca>
- General reference of standards: <http://www.cssinfo.com>

The NMS website (<http://www.tpsgc-pwgsc.gc.ca/biens-property/ddn-nms/index-eng.html>) also links to other documents references in the NMS under its "Links" feature.

6 Specifying Materials

The practice of specifying actual brand names, model numbers, etc., is against departmental policy except for special circumstances. The method of specifying materials shall be by using recognized standards such as those produced by Canadian Gas Association (CGA), Canadian General Standards Board (CGSB), Canadian Standards Association (CSA), and Underwriters' Laboratories of Canada (ULC), or by trade associations such as Canadian Roofing Contractors' Association (CRCA) and Terrazzo, Tile, Marble Association of Canada (TTMAC). Canadian standards should be used wherever possible.

If the above method cannot be used and where no standards exist, specify by a non-restrictive, non-trade name "prescription" or "performance" specifications.

In exceptional or justifiable circumstances or if no standards exist and when a suitable non-restrictive, non-trade name "prescription" or "performance" specification cannot be developed, specify by trade name. Include all known materials acceptable for the purpose intended, and in the case of equipment, identify by type and model number.

Acceptable Materials: set up the paragraph format as follows:

Acceptable Materials:

1. ABC Co. Model [_____].
2. DEF Co. Model [_____].
3. GHI Co. Model [_____].

Alternative materials to those specified may be considered during the solicitation period, however, the onus will be on the Consultant to review and evaluate all requests for approval of alternative materials.

The term "Acceptable Manufacturers" should not be used, as this restricts competition and does not ensure the actual material or product will be acceptable. A list of words and phrases that should be avoided is included in the NMS User's Guide.

Sole Sourcing: Sole sourcing for materials and work can be used for proprietary systems (ie. fire alarm systems, EMCS systems). **Substantiation and/or justification will be required.**

Wording for the sole source of work should be in Part 1 as:

"Designated Contractor

- .1 Hire the services of [_____] to do the work of this section."

Wording for the sole source of EMCS systems should be in Part 1 as

"Designated Contractor

- .1 Hire the services of [_____] or its authorized representative to complete the work of all EMCS sections."

and in Part 2 as "Materials

- .1 There is an existing [_____] system presently installed in the building. All materials must be selected to ensure compatibility with the existing [_____] system.

Wording for the sole source of materials (ie. fire alarm systems) should be in Part 2 as:

"Acceptable materials

.1 The only acceptable materials are [] .”

Prior to including sole source materials and/or work, the Consultant should contact the Project Manager to obtain the approval for the sole sourcing.

7 Unit Prices

Unit prices are used where the quantity can only be estimated (eg. earth work) and the approval of the Project Manager must be sought in advance of their use.

Use the following wording:

[The work for this section] or [define the specific work if required, e.g. rock excavation] will be paid based on the actual quantities measured on site and the unit prices stated in the Bid and Acceptance Form.

In each applicable NMS section, replace paragraph title "Measurement for Payment" with "Unit Prices".

Sample of Unit Price Table:

The Unit Price Table designates the Work to which a Unit Price Arrangement applies.

- (a) The Price per Unit and the Estimated Total Price must be entered for each Item listed.
- (b) Work included in each item is as described in the referenced specification section.

Item	Specification Reference	Class of Labour, Plant or Material	Unit of Measurement	Estimated Quantity	Price per Unit GST/HST extra	Estimated Total Price GST / HST extra
TOTAL ESTIMATED AMOUNT						
Transfer amount to subparagraph 1)(b) of BA03						

8 Cash Allowances

Construction contract documents should be complete and contain all of the requirements for the contractual work. Cash allowances are to be used only under exceptional circumstances (ie. utility companies, municipalities), where no other method of specifying is appropriate. Obtain approval from the Project Manager in advance to include cash allowances and then use "Section 01 21 00 - Allowances" of the NMS to specify the criteria.

9 Warranties

It is the practice of PWGSC to have a 12 month warranty and to avoid extending warranties for more than 24 months. When necessary to extend beyond the 12 month warranty period provided for in the General Conditions of the contract, use the following wording in Part 1 of the applicable technical sections, under the heading "Extended Warranty":

- "For the work of this Section [], the 12 month warranty period is extended to 24 months.
- Where the extended warranty is intended to apply to a particular part of a specification section modify the above as follows: "For [] the 12 month ... [] months."

Delete all references to manufacturers' guarantees.

10 Scope of Work

No paragraphs noted as "Scope of Work" are to be included.

11 Summary and Section Includes in Part -1 General of Section

Do not use "Summary" and "Section Includes."

12 Related Sections

In every section of the specification at 1.1 "Related Sections": coordinate the list of related sections and appendices. Ensure co-ordination among the sections of the specification and ensure not to reference any section or appendices which do not exist.

13 Index

List all the plans and specification sections with correct number of pages, section names and correct drawing titles in the format shown in Appendix A.

14 Regional Guide

The Consultant should contact the Project Manager to obtain the region's requirements for Division 01 or other short form specifications as might be appropriate. For example, it is required in the National Capital Region that regional Section 01 00 10 - General Instructions be used on all projects.

15 Health and Safety

It is required that all project specifications include "Section 01 35 29.06 - Health and Safety Requirements." Confirm with the Project Manager to determine if there are any instructions to meet regional requirements.

16 Designated Substances Report

Include "Section 01 14 25 - Designated Substances Report"

17 Subsurface Investigation Reports

Subsurface Investigation Report(s) are to be included after Section 31 and the following paragraph should be added to Section 31:

Subsurface investigation report(s)

.1 Subsurface investigation report(s) are included in the specification following this section.

When the Project Manager determines that it is not practical to include the subsurface investigation report(s), alternate instructions will be provided.

Where tender documents are to be issued in both official languages, the subsurface investigation report(s) shall be issued in both languages.

In addition to the provision of the Subsurface Investigation Report, the foundation information required by the National Building Code of Canada 2005 (Division C, Part 2, 2.2.4.6) shall be included on foundation drawings.

18 Experience and Qualifications

Remove experience and qualification requirements from specification sections.

19 Prequalification and Pre-award submissions

Do not include in the specification any mandatory contractor and/or subcontractor prequalification or pre-award submission requirements that could become a contract award condition. If a prequalification process or a pre-award submission is required, contact the Project Manager.

There should be no references to certificates, transcripts or license numbers of a trade or subcontractor being included with the bid.

20 Contracting Issues

Specifications describe the workmanship and quality of the work. Contracting issues should not appear in the specifications. Division 00 of the NMS is not used for PWGSC projects.

Remove all references within the specifications, to the following:

- General Instructions to Bidders
- General Conditions
- CCDC documents
- Priority of documents
- Security clauses
- Terms of payment or holdback
- Tendering process
- Bonding requirements
- Insurance requirements
- Alternative and separate pricing
- Site visit (Mandatory or Optional)
- Release of Lien and deficiency holdbacks

DRAWINGS

1 Title Blocks

Use PWGSC title block for drawings and sketches (including addenda).

2 Dimensions

Dimensions are to be in metric only (no dual dimensioning).

3 Trade Names

Trade names on drawings are not acceptable. Refer to SECTION 3, SPECIFICATIONS, 6.0 Specifying Materials for specifying materials by trade name.

4 Specification Notes

No specification type notes are to appear on any drawing.

5 Terminology

Use the term "Departmental Representative" instead of Engineer, PWGSC, Owner, Consultant or Architect. "Departmental Representative" means the person designated in the Contract, or by written notice to the Contractor, to act as the Departmental Representative for the purposes of the Contract, and includes a person, designated and authorized in writing by the Departmental Representative to the Contractor.

Notations such as: "verify on site", "as instructed", "to match existing", "example", "equal to" or "equivalent to", "to be determined on site by "Departmental Representative", should not be indicated in the specifications as this promotes inaccurate and inflated bids. Specifications must permit bidders to calculate all quantities and bid accurately. If quantities are impossible to identify (i.e. cracks to be repaired) give an estimated quantity for bid purposes (unit prices). Ensure that the terminology used throughout the specifications is consistent and does not contradict the applicable standard construction contract documents.

6 Information to be included

Drawings should show the quantity and configuration of the project, the dimensions and details of how it is constructed. There should be no references to future work and no any information that will be changed by future addenda. The scope of work should be clearly detailed and elements not in contract should be eliminated or kept to an absolute minimum.

7 Drawing Numbers: Number drawings in sets according to the type of drawing and the discipline involved as follows (The requirements of SECTION 2 PWGSC NATIONAL CADD STANDARD will supercede these requirements, where warranted).

During the Design Phase of the project each submission and review must be noted on the Notes block of the drawing title, but at the time of construction document preparation, all revision notes should be removed.

Discipline	Drawing
Demolition	D1, D2, etc.
Architectural	A1, A2, etc.
Civil	C1, C2, etc.
Landscaping	L1, L2, etc.
Mechanical	M1, M2, etc.
Electrical	E1, E2, etc.
Structural	S1, S2, etc.
Interior Design	ID1, ID2, etc.

- 8 Presentation Requirements:** Present drawings in sets comprising the applicable demolition, architectural, structural, mechanical and electrical drawings in that order. All drawings should be of uniform standard size.
- 9 Prints:** Print with black lines on white paper. Blue prints are acceptable for document submissions at 33%, 66% and 99% stages. Confirm with Project Manager the size of prints to be provided for review purposes.
- 10 Binding:** Staple or otherwise bind prints into sets. Where presentations exceed 20 sheets, the drawings for each discipline may be bound separately for convenience and ease of handling.
- 11 Legends:** Provide a legend of symbols, abbreviations, references, etc., on the front sheet of each set of drawings or, in large sets of drawings, immediately after the title sheet and index sheets.
- 12 Schedules:** Where schedules occupy entire sheets, locate them next to the plan sheets or at the back of each set of drawings for convenient reference. *See CGSB 33-GP-7 Architectural Drawing Practices for schedule arrangements.*
- 13 North Points:** On all plans include a north point. Orient all plans in the same direction for easy cross-referencing. Wherever possible, lay out plans so that the north point is at the top of the sheet.
- 14 Drawing Symbols:** Follow generally accepted drawing conventions, understandable by the construction trades, and in accordance with PWGSC publications.

ADDENDA

1 Format

Prepare addenda using the format shown in Appendix B. No signature type information is to appear.

Every page of the addendum (including attachments) must be numbered consecutively. All pages must have the PWGSC project number and the appropriate addendum number. Sketches shall appear in the PWGSC format, stamped and signed.

No Consultant information (name, address, phone #, consultant project # etc.) should appear in the addendum or its attachments (except on sketches).

2 Content

Each item should refer to an existing paragraph of the specification or note/detail on the drawings. The clarification style is not acceptable.

DOCUMENTATION

Translation

When required, all documentation included in the construction contract documents shall be in both official languages.

Ensure that English and French documents are equal in all respects. There can be no statement that one version takes precedence over the other.

Consultant shall provide:

- Per construction document submission, a completed and signed Checklist for the Submission of Construction Documents. See Appendix 'A'.
- Specification: originals printed one side on 216 mm x 280 mm white bond paper.
- Index: as per Appendix 'C'
- Addenda (if required): as per Appendix 'B' (to be issued by PWGSC).
- Drawings: reproducible originals, sealed and signed by the design authority.
- Tender information:
 - Including a description of all units and estimated quantities to be included in unit price table.
 - Including a list of significant trades including costs. PWGSC will then determine which trades, if any, will be tendered through the Bid Depository.
 - Government Electronic Tendering System (MERX): Consultants to provide an electronic true copy of the final documents (specifications and drawings) on one or multiple CD-ROM in Portable Document Format (PDF) without password protection and printing restrictions. The electronic copy of drawings and specifications is for bidding purposes only and do not require to be signed and sealed. See Appendix 'D' and Appendix 'E'.

PWGSC shall provide:

- General and Special Instructions to Bidders
- Bid and Acceptance Form
- Standard Construction Contract Documents

SECTION 4 CLASSES OF CONSTRUCTION COST ESTIMATES USED BY PWGSC

DESCRIPTION OF THE CLASSES OF ESTIMATES USED BY PWGSC FOR CONSTRUCTION COSTING OF BUILDINGS PROJECTS

Class 'D' (Indicative) Estimate:

Based upon a comprehensive statement of requirements, and an outline of potential solutions, this estimate is to provide an indication of the final project cost, and allow for ranking all the options being considered.

Submit Class D cost estimates in elemental cost analysis format latest edition issued by the Canadian Institute of Quantity Surveyors with cost per m² for current industry statistical data for the appropriate building type and location. Include a summary in the cost estimate, plus full back up, showing items of work, quantities, unit prices, allowances and assumptions.

The level of accuracy of a class D cost estimate shall be such that no more than a 20% contingency allowance is required.

Class 'C' Estimate:

Based on a comprehensive list of requirements and assumptions, including a full description of the preferred schematic design option, construction/design experience, and market conditions. This estimate must be sufficient for making the correct investment decision.

Submit Class C cost estimates in elemental cost analysis format latest edition issued by the Canadian Institute of Quantity Surveyors with cost per m² for current industry statistical data for the appropriate building type and location. Include a summary in the cost estimate, plus full back up, showing items of work, quantities, unit prices, allowances and assumptions.

The level of accuracy of a class C cost estimate shall be such that no more than a 15% contingency allowance is required.

Class 'B' (Substantive) Estimate:

Based on design development drawings and outline specifications, which include the design of all major systems and subsystems, as well as the results of all site/installation investigations. This estimate must provide for the establishment of realistic cost objectives and be sufficient to obtain effective project approval.

Submit Class B cost estimates in elemental cost analysis format latest edition issued by the Canadian Institute of Quantity Surveyors. Include a summary in the cost estimate, plus full back up, showing items of work, quantities, unit prices, allowances and assumptions.

The level of accuracy of a class B cost estimate shall be such that no more than a 10% design contingency allowance is required.

Class 'A' (Pre-Tender) Estimate:

Based on completed construction drawings and specifications prepared prior to calling competitive tenders. This estimate must be sufficient to allow a detailed reconciliation/negotiation with any contractor's tender.

Submit Class A cost estimates in both elemental cost analysis format and trade divisional format latest edition issued by the Canadian Institute of Quantity Surveyors. Include a summary in the cost estimate, plus full back up, showing items of work, quantities, unit prices, allowances and assumptions.

The level of accuracy of a class A cost estimate shall be such that no more than a 5% design contingency allowance is required.

SECTION 5 TIME MANAGEMENT

1 Time Management, Planning, and Control

The Time Management, Planning, and Control Specialist (scheduler) shall provide a Project Planning and Control System (Control System) for Planning, Scheduling, Progress Monitoring and Reporting and a Time Management, Planning, and Control Report (Progress Report). It is required that a fully qualified and experienced Scheduler play a major role in providing services in the development and monitoring of the project schedule.

The scheduler will follow good industry practices for schedule development and maintenance as recognized by the Project Management Institute (PMI).

PWGSC presently utilizes the Primavera Suite software and MicroSoft Project for its current Control Systems and any software used by the consultant should be fully integrated with these, using one of the many commercially available software packages.

1.1 Schedule Design

Project Schedules are used as a guide for execution of the project as well as to communicate to the project team when activities are to happen, based on network techniques using Critical Path Method (CPM).

When building a Control System you must consider:

1. The level of detail required for control and reporting;
2. The reporting cycle- monthly and what is identified in the Terms of Reference, but also includes Exception Reports;
3. That the duration must be in days;
4. What is required for reporting in the Project Teams Communications Plan and
5. The nomenclature and coding structure for naming and reporting requirements of activities, schedules and reports.

1.2 Schedule Development

For purposes of monitoring and reporting of project progress and ease of schedule review it is important to maintain a standard for all schedules and reports starting with the Work Breakdown Structure (WBS), identification of Milestones, naming of activities as well as schedule outputs and paper sizing and orientation.

Work Breakdown Structure

When developing the schedule the consultant needs to use PWGSC standards and practices. Two basic requirements are the National Project Management System

(NPMS) and a Work Breakdown Structure (WBS), structured supporting the NPMS (Levels 1-4).

The WBS is as follows:

- Level 1 Project Title (NPMS)
- Level 2 Project Stage (NPMS)
- Level 3 Project Phase (NPMS)
- Level 4 Processes to meet Deliverables/Control Points Milestones (NPMS)
- Level 5 Sub-Processes and Deliverables in support of Level 4
- Level 6 Discrete activities. (Work Package)

Not all the Stages, Phases and Processes in the NPMS will be required on all the projects, however the structure remains the same.

Major and Minor Milestones

The Major Milestones are standard Deliverables and Control Points within NPMS and are required in all schedule development. These Milestones will be used in Management Reporting within PWGSC as well as used for monitoring project progress using Variance Analysis. The Minor milestones are process deliverables (Level 4) or sub-process deliverables (level 5) also used in Variance Analysis.

Each Milestone will also be assigned appropriate coding for Status Reporting and Management Reporting.

Milestones must have zero duration and are used for measuring project progress.

Milestones may also be external constraints such as the completion of an activity, exterior to the project, affecting the project.

Activities

All activities will need to be developed based on Project Objectives, Project Scope , Major and Minor Milestones, meetings with the project team and the scheduler's full understanding of the project and it's processes.

Subdivide the elements down into smaller more manageable pieces that organize and define the total scope of work in Levels 5-6 that can be scheduled, costed, monitored and controlled. This process will develop the Activity List for the project.

Each activity is a discrete element of work and is the responsibility of one person to perform.

Each activity will describe the work to be performed using a verb and noun combination (i.e. Review Design Development Report).

Activities should not have durations longer than 2 update cycles, with exception of activities not yet defined in a "Rolling Wave".

Each activity will be assigned at WBS level 6 and appropriately coded for Status Reporting and Management Reporting.

These elements will become activities, interdependently linked in Project Schedules.

Project Logic

Once the WBS, Milestones and Activity List have been developed the activities and milestones can be linked in a logical manner starting with a Project Start Milestone. Every activity and milestone must be linked in a logical manner using either a Finish to Start (FS), Finish to Finish (FF), Start to Start (SS) or Start to Finish (SF) relationship. There can be no open-ended activities or milestones.

A Finish to Start (FS) is the preferred relationship.

When developing relationships avoid the use of lags and constraints in place of activities and logic.

Activity Duration

The activity duration (in days) is the estimated length of time it will take to accomplish a task.

Consideration needs to be taken in how many resources are needed and are available, to accomplish any activity. (Example: availability of Framers during a “Housing Boom”.) Other factors are the type or skill level of the available resources, available hours of work, weather etc.

There will be several types of lists and schedules produced from this process, which will form part of the Progress Report.

Activity List

An Activity List identifies all activities including milestones required to complete the whole project.

Milestone List

A Milestone List identifies all project Major and Minor milestones.

Master Schedule

A Master Schedule is a schedule used for reporting to management at WBS level 4 and 5 that identifies the major activities and milestones derived from the detailed schedule. Cash Flow projections can be assigned at WBS level 5 for monitoring the Spending Plan.

Detailed Project Schedule

A Detailed Project Schedule is a schedule in reasonable detail (down to WBS Level 6 and 7) for progress monitoring and control, this will ensure that the schedule shall be in sufficient detail to ensure adequate planning and control.

1.3 Schedule Review and Approval

Once the scheduler has identified and properly coded all the activities; put them into a logical order and then determined the appropriate durations. The scheduler can then analyze the schedule to see if the milestone dates meet the contractual requirements and then adjust the schedule accordingly by changing durations, resource leveling or changing logic.

When the schedule has been satisfactorily prepared the scheduler can present the detailed schedule to the Project Team for approval and be Baselined. There may be several iterations before the schedule meets with the Project Teams agreement and the contractual requirements.

The final agreed version must be copied and saved as the Baseline to monitor variances for reporting purposes.

1.4 Schedule Monitoring and Control

Once Baselined the schedule can be better monitored, controlled and reports can be produced.

Monitoring is performed by, comparing the baseline activities % complete and milestone dates to the actual and forecast dates to identify the variance and record any potential delays, outstanding issues and concerns and provide options for dealing with any serious planning and scheduling issues in report form.

Analyze and report from early start sequence on all activities due to start, underway, or finished for the complete project.

There will be several reports generated from the analysis of the baseline schedule and will form part of the Time Management Report in the Required Services Sections (RS)

Progress Reports

A Progress Report reflects the progress of each activity to the date of the report, any logic changes, both historic and planned, projections of progress and completion the actual start and finish dates of all activities being monitored.

The Progress Report includes:

A Narrative Report, detailing the work performed to date, comparing work progress to planned, and presenting current forecasts. This report should summarize the progress to date, explaining current and possible deviations and delays and the required actions to resolve delays and problems with respect to the Detail Schedule, and Critical Paths.

Narrative reporting begins with a statement on the general status of the project followed by a summarization of delays, potential problems and project status criticality, any

potential delays, outstanding issues and concerns and options for dealing with any serious planning and scheduling issues.

A Variance Report, with supporting schedule documentation, detailing the work performed to date, comparing work progress to planned. This report should summarize the progress to date, explaining all causes of deviations and delays and the required actions to resolve delays and problems with respect to the Detail Schedule, and Critical Paths.

A Criticality Report identifying all activities and milestones with negative, zero and up to five days Total Float used as a first sort for ready identification of the critical, or near critical paths through the entire project.

Included in the Progress Report as attachments are: WBS chart, Activity Lists, Milestone Lists, Master Schedules, Detailed Project Schedule

Exception Report

The Scheduler is to provide continuous monitoring and control, timely identification and early warning of all unforeseen or critical issues that affect or potentially affect the project.

If unforeseen or critical issues arise, the Scheduler will advise the Project Manager and submit proposed alternative solutions in the form of an Exception Report.

An Exception Report will include sufficient description and detail to clearly identify:

1. Scope Change: Identifying the nature, reason and total impact of all identified and potential project scope changes affecting the project.
2. Delays and accelerations: Identifying the nature, the reason and the total impact of all identified and potential duration variations.
3. Options Enabling a Return to the project baseline: Identifying the nature and potential effects of all identified options proposed to return the project within baselined duration.

1.5 Standard Submissions

At each submission or deliverable stage provide a complete and updated Progress Report, the contents of each report will vary with requirements and at each project phase. Typically a Progress Report has:

1. Executive Summary;
2. Narrative Report;
3. Variances Report;
4. Criticality Report;
5. Exception Report (as required)
6. Work Breakdown Structure Chart;
7. Activity List;
8. Milestone List;
9. Master Schedule with Cash Flow Projections;
10. Detail Project Schedule (Network Diagram or Bar Charts);

1.6 Schedule Outputs and Reporting Formats

The sheet sizing and orientation is more a suggestion that a role, changes to the paper format may vary to accommodate the information and column information required.

Progress Reports

Paper Size: Letter

Paper Format: Portrait

Title Format: Project Title; Report Type; Print Date; Data Date; Revision Block

Body Text: Narratives for each report to match other reports generated in the D.S.S.

Variance Report Columns: Activity ID, Activity Name, Planned Finish, Revised Finish, Variance, Activity % Complete,

Criticality Report Columns: Activity ID, Activity Name, Duration, Start, Finish, Activity % Complete, Total Float.

Exception Reports

Paper Size: Letter

Paper Format: Portrait

Title Format: Project Title; Report Type; Print Date; Data Date; Revision

Body Text: Narrative to match other reports generated in the D.S.S.

Paper Size: Letter

Paper Format: Landscape

Title Format: Project Title; Report Type; Print Date; Data Date; Revision

Columns: Activity ID, Activity Name, Duration, Remaining Duration, Start, Finish, Total Float.

Work Breakdown Structure (indent tree):

Paper Size: Letter

Paper Format: Portrait

Columns: WBS Code, WBS Name, Duration, Cost estimate, start and finish dates.

Footer Format: Project Title; Report Type; Print Date; Data Date; Revision Block

Activity Lists

Paper Size: Letter

Paper Format: Portrait

Columns: Activity ID, Activity Name, Start, Finish, Predecessor, Successor.

Footer Format: Project Title; Report Type; Print Date; Data Date; Revision Block

Sort with Early Start, then Early Finish, then Activity ID and with the WBS.

Milestone Lists

Paper Size: Letter

Paper Format: Portrait

Footer Format: Project Title; Report Type; Print Date; Data Date; Revision Block
Columns: Activity ID, Activity Name, Start, Finish.

Sort with Early Start, then Early Finish, then Activity ID and without the WBS.

Master Schedule (Bar Chart)

Paper Size: 11X17
Paper Format: Landscape
Footer Format: Project Title; Report Type; Print Date; Data Date; Revision Block
Columns: Activity ID, Activity Name, Duration, Activity % Complete, Start, Finish,
Total Float.

Sort with Early Start, then Early Finish, then Activity ID and with the WBS.

Detailed Project Schedules (Bar Chart)

Paper Size: 11X17
Paper Format: Landscape
Footer Format: Project Title; Report Type; Print Date; Data Date; Revision Block
Columns: Activity ID, Activity Name, Duration, Activity % Complete, Start, Finish,
Total Float.

Sort with Early Start, then Early Finish, then Activity ID and with the WBS.

APPENDIX 'A' - Checklist for the Submission of Construction Documents to PWGSC

Last updated November 21, 2012

Date:	
Project Title:	Project Location:
Project Number:	Contract Number:
Consultant's Name:	PWGSC Project Manager:
Review Stage: 66% <input type="checkbox"/> 99% <input type="checkbox"/> 100% <input type="checkbox"/>	

Item	Verified by:	Comments:	Action by:
Specifications:			
1 National Master Specifications			
1a The current edition of the NMS has been used.			
1b Sections have been included for all work identified on drawings and sections edited.			
2 Specification Organization			
2a Either the NMS 1/3 - 2/3 page format or the Construction Specifications Canada full page format is used.			
2b Each Section starts on a new page and the Project Number, Section Title, Section Number and Page Number show on each page.			
2c Specification date and consultant's name are not indicated.			
3 Terminology			
3a The term Departmental Representative is used instead of Engineer, PWGSC, Owner, Consultant or Architect.			
3b Notations such as: "verify on site", "as instructed", "to match existing", "example", "equal to", "equivalent to" and "to be determined on site by" are not used.			
4 Dimensions			
4a Dimensions are provided in metric only.			
5 Standards			
5a The latest edition of all references quoted is used.			

6 Specifications Materials			
6a The method of specifying materials uses recognized standards. Actual brand names and model numbers are not specified.			
6b Materials are specified using standards and performance criteria (if not, the correct form of acceptable materials has been used).			
6c Identify if non-restrictive, non-trade name “prescription” or “performance” specifications are used.			
6d Indicate if a list of acceptable materials have been used.			
6e The term “Acceptable Manufacturers” is not used.			
6f No sole sourcing has been used.			
6g If sole sourcing has been used, the correct wording has been used and a justification provided to RPCD for the sole sourced products.			
7 Unit Prices			
7a Unit prices are used only for work that is difficult to estimate.			
8 Cash Allowances			
8a Indicate if cash allowances have been used.			
9 Warranties			
9a Indicate if warranties extend more than a 12 or 24 months period.			
9b Manufacturers guarantees are not indicated.			
10 Scope of Work			
10 No paragraphs noted as “Scope of Work” are included.			
11 Summary and Section Includes			
11a In part 1 of section, paragraphs “Summary” and “Section Includes” are not used.			
12 Related Sections			
12a The list of related sections and appendices are coordinated.			
13 Index			
13a The index shows a complete list of plans and specification sections with the correct number of pages and correct drawing titles and section names.			
14 Regional Guide Specifications			
14a General Instructions is included (Section 01 00 10 in the NCA).			

15 Health and Safety			
15a Section 01 35 29.06 - Health and Safety Requirements is included.			
16 Designated Substances Report			
16 a Section 01 14 25 - Designated Substances Report is included.			
17 Subsurface Investigation Reports			
17a Subsurface Investigation Reports are included in Division 31.			
18 Experience and qualifications			
18a Experience and qualification requirements do not appear in the specification sections			
19 Pre-qualifications			
19a There are no mandatory contractor and/or subcontractor pre-qualification requirements or references to certificates, transcripts or license numbers of a trade or subcontractor being included in the bid.			
20 Contracting Issues			
20a Contracting issues do not appear in the specifications.			
20b Division 00 of the NMS is not used.			
21 Quality Issues			
21a There are no specification clauses with square brackets “[]” or lines “___” indicating that the document is incomplete or missing information.			

Item	Verified by:	Comments:	Action By:
Drawings:			
1 Title Blocks			
1a The PWGSC title block is used.			
2 Dimensions			
2a Dimensions are provided in metric only.			
3 Trade Names			
3a Trade names are not used.			
4 Specification Notes			
4a There is no specification type notes.			
5 Terminology			
5a The term Departmental Representative is used instead of Engineer, PWGSC, Owner,			

Consultant or Architect.			
5b Notations such as: “verify on site”, “as instructed”, “to match existing”, “example”, “equal to”, “equivalent to” and “to be determined on site by” are not used.			
6 Information to be included			
6a Architectural and Engineering Drawings have been stamped and signed by the design authority.			
6b The project quantity and configuration, dimensions and construction details are included.			
6c References to future work and elements not in contract do not appear or are kept to an absolute minimum and clearly marked.			

I confirm that the plans and specifications have been thoroughly reviewed and that the items listed above have been addressed or incorporated. I acknowledge and accept that by signing, I am certifying that all items noted above have been addressed.

Consultant's Representative: _____

Firm name: _____

Signature: _____ Date: _____

APPENDIX 'B' - Sample of Addendum

Last updated April 22, 2008

ADDENDUM No. _____

Project Number: _____

The following changes in the bid documents are effective immediately. This addendum will form part of the contract documents

DRAWINGS

SPEC NOTE: indicate drawing number and title, then list changes or indicate revision number and date, and re-issue drawing with addendum.

- 1 A1 Architectural
- .1

SPECIFICATIONS

SPEC NOTE: indicate section number and title.

- 1 Section 01 00 10 - General Instructions

SPEC NOTE: list all changes (i.e. delete, add or change) by article or paragraph

- .1 Delete article (xx) entirely.
 - .2 Refer to paragraph (xx.x) and change ...
- 2 Section 23 05 00 - Common Work Results - Mechanical
- .1 Add new article (x) as follows:

APPENDIX 'C' - Sample of Index

Last updated April 22, 2008

Project No: _____

Index
Page 1 of _____

DRAWINGS AND SPECIFICATIONS

DRAWINGS:

SPEC NOTE: List all Drawings by number and title.

C-1	Civil
L-1	Landscaping
A-1	Architectural
S-1	Structural
M-1	Mechanical
E-1	Electrical

SPECIFICATIONS:

SPEC NOTE: List all Divisions, Sections (by number and title) and number of pages.

<u>DIVISION</u>	<u>SECTION</u>	NO. OF PAGES
DIVISION 01	01 00 10 - General Instructions.....XX
	01 14 25 - Designated Substances Report.....XX
	01 35 30 - Health and Safety.....XX
DIVISION 23	23 xx xx	
DIVISION 26	26 xx xx	

APPENDIX 'D'

USER MANUAL ON DIRECTORY STRUCTURE AND NAMING CONVENTION STANDARDS FOR CONSTRUCTION TENDER DOCUMENTS ON CD ROM

Issued by:

Real Property Contracting Directorate

PWGSC

May 2005

Last Updated: June 3, 2008

Version 1.0

PREFACE

The Government of Canada (GoC) has committed to move towards an electronic environment for the majority of the services it offers. This covers the advertisement and distribution of contract opportunities, including construction solicitations. As a result, it is necessary to obtain a copy of construction drawings and specifications (in PDF format **without** password protection) on one or multiple CD-ROM to facilitate for the GoC the transfer of the construction drawings and specifications electronically to the Government Electronic Tendering System (GETS).

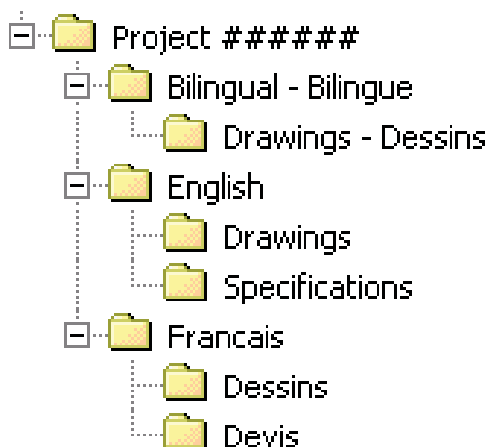
There is therefore a need to adopt a common directory structure and file-naming convention to ensure that the information made available to contractors electronically and in hard (printed) copy is in accordance with the sequence adopted in the real property industries, both for design and construction. This manual defines the standard to be followed by both consultants and print shops at time of formatting and organizing the information, whether drawings and specifications are created by scanning print documents or saved as PDF files from the native software (AutoCAD, NMS Edit, MS-Word, etc...) in which these were created.

It is important to note that the procedure described in this manual is not an indication that consultants are relieved from following the established standards for the production of drawings and specifications. The sole purpose of this manual is to provide a standard for the organization and naming of the electronic files that will be recorded on CD-ROM.

1. DIRECTORY STRUCTURE

1.1 1st, 2nd and 3rd Tier Sub-Folders

Each CD-ROM, whether it is for the original solicitation (tender call) or for an amendment (addendum), must have the applicable elements of the following high-level Directory Structure created:



The following important points are to be noted about the Directory Structure:

- The “*Project #####*” folder is considered the 1st Tier of the Directory Structure where *#####* represents each digit of the Project Number. The Project Number must always be used to name the 1st Tier folder and it is always required. Free text can be added following the Project Number, to include such things as a brief description or the project title;
- The “*Bilingual - Bilingue*”, “*English*” and “*Français*” folders are considered the 2nd Tier of the Directory Structure. The folders of the 2nd Tier **cannot** be given any other names since GETS uses these names for validation purposes. At least one of the “*Bilingual - Bilingue*”, “*English*” and “*Français*” folders is always required, and these must always have one of the applicable sub-folders of the 3rd Tier;
- The “*Drawings - Dessins*”, “*Drawings*”, “*Specifications*”, “*Dessins*” and “*Devis*” folders are considered the 3rd Tier of the Directory Structure. The folders of the 3rd Tier **cannot** be given any other names since GETS also uses these names for validation purposes. There must be always at least one of the applicable 3rd Tier folder in each document.

IMPORTANT:

The applicable elements of the Directory Structure (1st, 2nd and 3rd Tier folders) are always required and cannot be modified.

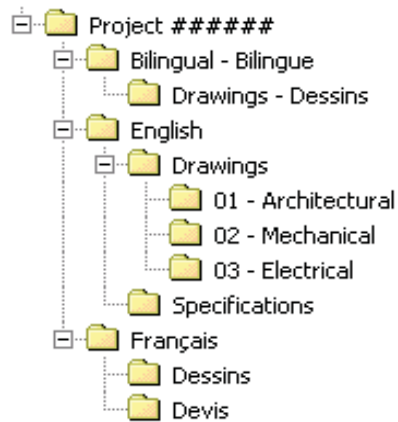
1.2 4th Tier Sub-Folders for Drawings

The “*Drawings – Dessins*”, “*Drawings*” and “*Dessins*” folders must have 4th Tier sub-folders created to reflect the various disciplines of the set of drawings.

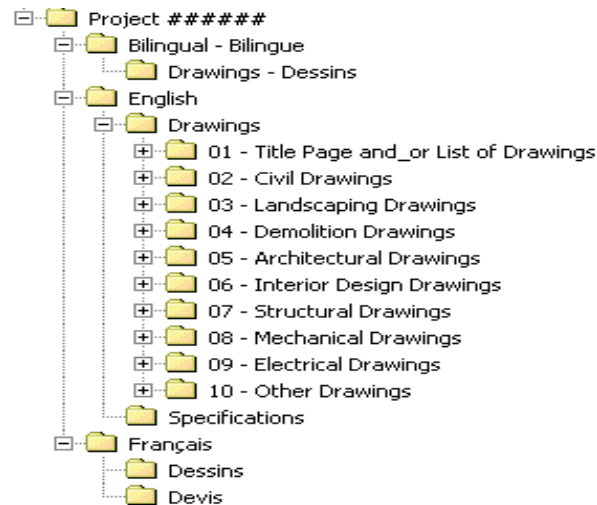
Because the order of appearance of the sub-folders on the screen will also determine the order of printing, it is necessary to start with a number the identification name of the sub-folders in the “Drawings – Dessins”, “Drawings” and “Dessins” folders.

Note: The first sub-folder must be always reserved for the Title Page and/or the List of Drawings unless the first drawing of the set is an actual numbered discipline drawing.

Examples of 4th Tier sub-folders for drawings:



or



1.2.1 Naming Convention

The 4th Tier sub-folders for drawings must adhere to the following standard naming convention.

For the “*Drawings*” and “*Dessins*” folders:

- Y

Where:

= A two digit number ranging from 01 to 99 (leading zeros must be included)

Y = The title of the folder

Example: 03 – Mechanical

For the “*Drawings - Dessins*” folder:

- Y - Z

Where:

= A two digit number ranging from 01 to 99 (leading zeros must be included)

Y = The English title of the folder

Z = The French title of the folder

Example: 04 - Electrical - Électricité

It should be noted that the numbering of the 4th Tier sub-folders is for sorting purposes only and is not tied to a specific discipline. For example, “*Architectural*” could be numbered 05 for a project where there is four other disciplines before “*Architectural*” in the set of drawings or 01 in another project where it’s the first discipline appearing in the set.

It is essential to ensure that the order of the drawings on the CD-ROM be exactly the same as in the hard copy set. GETS will sort each drawing for both screen display and printing as per the following rules:

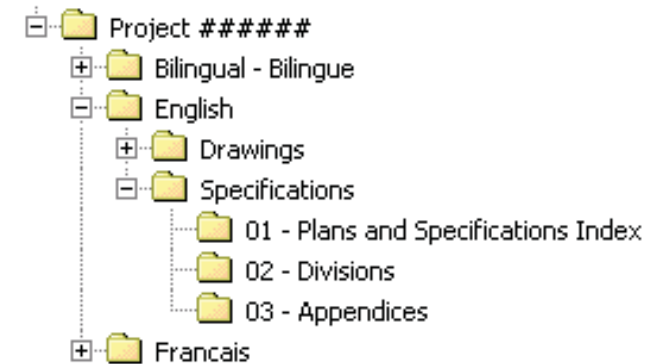
- The alphanumerical sorting is done on an ascending order;
- The alphanumerical order of the sub-folders determines the order of appearance on the screen as well as the order of printing (as an example: all the drawing PDF files in the 01 sub-folder will be printed in alphanumerical order before the drawings in the 02 sub-folder etc...);
- Each drawing PDF file within each sub-folder will also be sorted alphanumerically. This will determine the order of appearance on the screen as well as the order of printing (i.e. Drawing A001 will be printed before Drawing A002, Drawing M02 before Drawing M03, etc...).

1.3 4th Tier Sub-Folders for Specifications

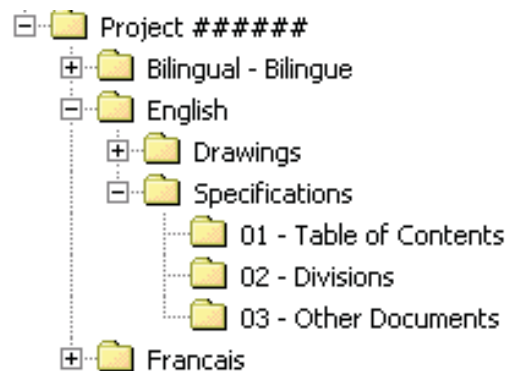
The “*Specifications*” and “*Devis*” folders must have 4th Tier sub-folders created to reflect the various elements of the specifications.

Because the order of appearance of the sub-folders on the screen will also determine the order of printing, it is necessary to start with a number the identification name of the sub-folders in the “Specifications” and “Devis” folders.

Examples of 4th Tier sub-folders for specifications:



or



1.3.1 Naming Convention

The 4th Tier sub-folders for specifications must adhere to the following standard naming convention.

For the “Specifications” and “Devis” folders:

- Y

Where:

= A two digit number ranging from 01 to 99 (leading zeros must be included)

Y = The title of the folder

Example: 02 – Divisions

It should be noted that the numbering of the 4th Tier sub-folders is for sorting purposes only and is not tied to an element of the specifications.

It is essential to ensure that the order of the elements of the specifications on the CD-ROM be exactly the same as in the hard copy. GETS will sort each element of the specifications for both

screen display and printing as per the following rules:

- The alphanumerical sorting is done on an ascending order;
- The alphanumerical order of the sub-folders determines the order of appearance on the screen as well as the order of printing (as an example: all the specifications PDF files in the 01 sub-folder will be printed, in alphanumerical order before the PDF files in the 02 sub-folder, etc...);
- Each specifications PDF file within each sub-folder will also be sorted alphanumerically. This will determine the order of appearance on the screen as well as the order of printing (i.e. Division 01 will be printed before Division 02, 01 - Appendix A before 02 - Appendix B, etc...).

2. NAMING CONVENTION FOR PDF FILES

Each drawing, specifications division or other document that are part of the tender documents must be converted in PDF format (without password protection) in accordance with the following standard naming convention and each PDF file must be located in the appropriate sub-folder of the Directory Structure.

2.1 Drawings

Each drawing must be a **separate single page** PDF file. The naming convention of each drawing must be:

X### - Y

Where:

X = The letter or letters from the drawing title block ("A" for Architectural or "ID" for Interior Design for example) associated with the discipline

= The drawing number from the drawing title block (one to three digits)

Y = **The drawing name from the drawing title block (for bilingual drawings, the name in both English and French is to appear)**

Example: A001 - First Floor Details

Each drawing that will be located in the appropriate discipline 4th Tier sub-folders must be named with the same letter ("A" for Architectural Drawings for example) and be numbered. The drawing number used to name the PDF file must match as much as possible the drawing number of the actual drawing (the exception being when leading zeros are required).

The following important points about drawings are to be noted:

- The drawing PDF files within each sub-folder are sorted alphanumerically for both displaying and printing. If there are more than 9 drawings in a particular discipline the numbering must use at least two numerical digits (i.e. A01 instead of A1) in order to avoid displaying drawing A10 between A1 and A2. The same rule applies when there are more than 99 drawings per discipline i.e. three digits instead of two must be used for the numbering (for example M003 instead of M03);

- If drawing PDF files are included in the “*Bilingual - Bilingue*” folder, these cannot be included as well in the “*English*” and/or “*Français*” folders;
- If drawings not associated with a particular discipline are not numbered (Title Page or List of Drawings for example), these will be sorted alphabetically. While this does not represent a problem if there is only one drawing in the sub-folder, it could disrupt the order when there are two or more drawings. If the alphabetical order of the drawings name does not represent the order on the hard copy set, the drawings are to be named as per the following standard convention when converted in PDF format to ensure proper display and printing order.

- Y

Where:

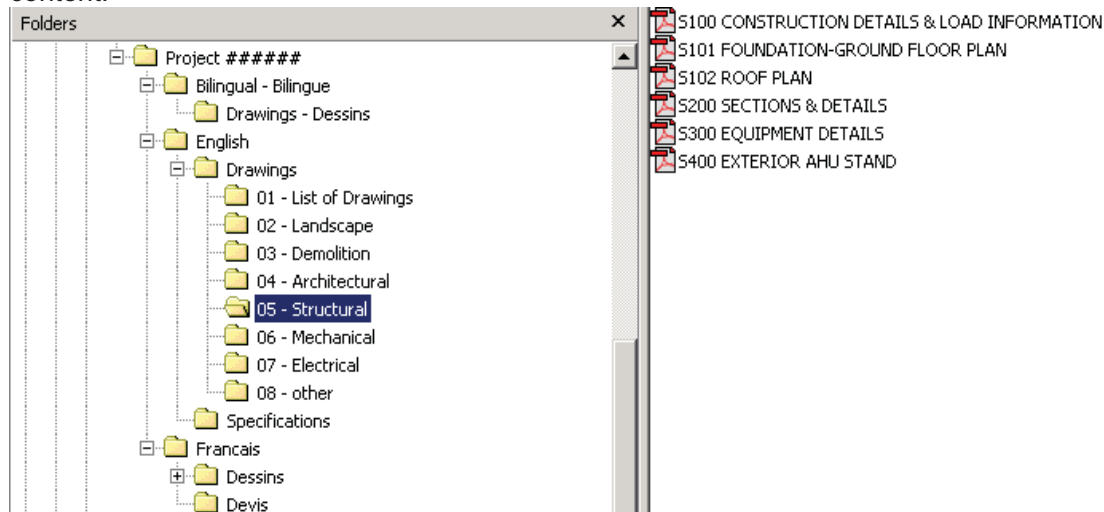
= A two digit number ranging from 01 to 99 (leading zeros must be included)

Y = The name of the drawing

Example: 01 - Title Page
02 - List of Drawings

If numbers are not used in the PDF files name, “*List of Drawings*” will be displayed before “*Title Page*” because “L” comes before “T” in the alphabet.

Example of a 4th Tier Drawings sub-folder's content:



2.2. Specifications

Each Specifications Division must be a separate PDF file and all pages contained in each PDF file must have the same physical size (height, width). The Plans and Specifications Index must

also be a separate PDF file. If there are other documents that are part of the Specifications (e.g. Appendix or other) these are to be separate PDF files as well.

2.2.1 Documents other than Specifications Divisions

Because PDF files within the Specifications sub-folders are sorted alphanumerically (in ascending order) for both on screen display and printing order, all files that appear in folders other than the “*Divisions*” sub-folder must be named using a number:

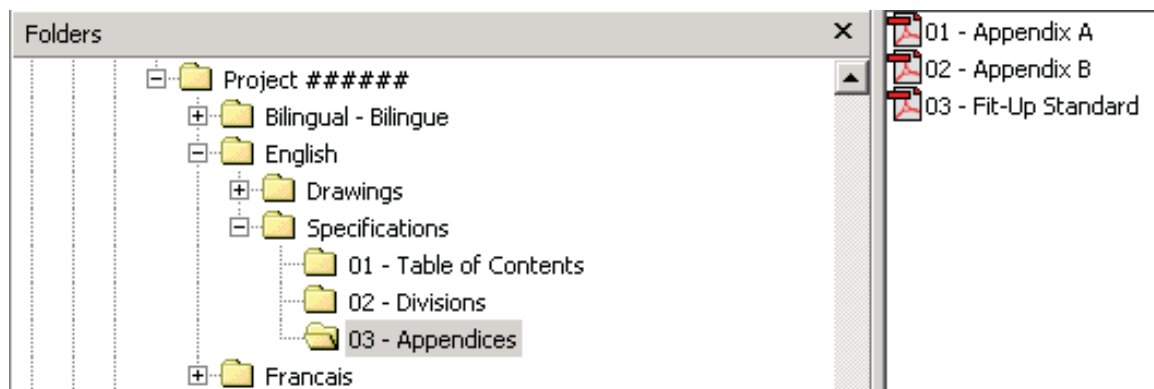
- Y

Where:

= Two digit number ranging from 01 to 99 with leading zeros required
Y = Name of the document

Example: 01 - Plans and Specifications Index

Example of a sub-folder content (sub-folder other than “*Divisions*”):



2.2.2 Specifications Divisions

The Specifications Divisions must be named as follows:

Division ## - Y

Where:

Division ## = The actual word “*Division*” followed by a space and a two digit number ranging from 01 to 99 (with leading zeros required)

Y = Name of the Specifications Division as per **CSC/CSI MasterFormat™**

Example: Division 05 – Metals

The following important point about specifications is to be noted:

- The Numbering of the Divisions **cannot** be altered from **CSC/CSI MasterFormat™** even if some Divisions are not used in a given project. For example, Division 05 will always remain Division 05 even if Division 04 is not used for a given project.

Example of a “Divisions” sub-folder content:



3. CD-ROM LABEL

Each CD-ROM is to be labeled with the following information:

Project *Number* / *Numéro de projet*

Project *Title* / *Titre du projet*

Documents for Tender / Documents pour appel d'offres

CD X of/de X

Example:

Project 123456 / Projet 123456

Repair Alexandra Bridge / Réparation du pont Alexandra

Documents for Tender / Documents pour appel d'offres
CD 1 of/de 1

APPENDIX 'E'

BASIC REFERENCE GUIDE ON CONVERTING CONSTRUCTION DRAWINGS INTO PORTABLE DOCUMENT FORMAT (PDF)

Issued by:
Real Property Contracting Directorate
PWGSC

May 2005 Last Updated: May 3, 2005

Version 1.0

PREFACE

Portable Document Format (PDF) is the standard format for documents that are posted on the Government Electronic Tendering System (GETS). There is therefore a need to obtain from architectural and engineering consultants an electronic copy of drawings and specifications in PDF for tendering Government of Canada (GoC) construction projects.

In order to have the highest quality in term of resolution and printing, consultants should to the greatest extent possible have the PDF drawing and specification files derived from the native software in which they were created. Scanning is permissible but only in special circumstances, for example when there is no electronic version of a drawing being included in a construction tender package.

The purpose of this document is to provide basic information on the conversion of Computer Aided Design and Drafting (CADD) drawings in PDF. Creating a PDF file from a CADD drawing is a relatively simple process once all the necessary configurations and settings are in place. It actually should not take any longer than it would take to create a plot file or to send a drawing to a printer. The information in this guide is not intended to cover all technical aspects of the conversion, which can be done using various methods, but rather to highlight important points about the process and file settings. The conversion of specifications is not covered in this basic reference guide since it does not require any special configuration or setting.

The information provided in this basic reference guide is not an indication that consultants are relieved from following the established standards for the production of drawings and specifications. The sole purpose of this guide is to provide basic information on the PDF conversion process bearing in mind that additional detailed technical information is available from the various software manufacturers.

1. PRINTER DRIVERS

Adobe Acrobat provides two different printer drivers that are able to convert CADD drawing into PDF format, Acrobat PDF Writer and Acrobat Distiller. Before creating a PDF file from a CADD drawing, a choice must be made as to which one will be used.

Acrobat PDF Writer is a non-PostScript printer driver that works best with documents that don't contain complex graphics

Acrobat Distiller is a PostScript printer driver that works best with documents that contain PostScript fills, Encapsulated PostScript (EPS) graphics, or other complex elements.

It is recommended that Acrobat Distiller be used to create PDF file of architectural and engineering drawings due to their size and complex graphical nature.

2. PRINTER CONFIGURATION

Before converting a CADD drawing to PDF, an Acrobat printer configuration file for the PDF paper size needs to be created. This function can be done in the CADD software rather than using a custom paper size defined for the Acrobat distiller feature. The recommended method is to add a PostScript Adobe plotter in the CADD software and making the necessary setting in terms of media source and size, scale and orientation. The configuration can then be re-used to simplify the conversion process for future files that use the same page size.

As an alternative, although not recommended, a custom-defined size can be created in Acrobat Distiller in the *properties* menu.

3. CREATING PDF FILES

Once the printer configuration has been done in the CADD software, open up Acrobat Distiller and make the necessary settings in the *preferences* and *job options* sub-menu. Ensure that the page size match the sheet size selected in the CADD software to create the file. Particular settings can be saved under different names for future use.

With the Acrobat Distiller application open, ensure the required sheet size is displayed in the *job options* window. Then it is simply a matter of bringing the CADD file into the Acrobat Distiller creation box.

A progress bar will show during the conversion and the newly converted PDF file should open up and be displayed for verification.

4. PDF FILES SETTINGS

4.1 Security

Adobe Acrobat contains security features that can be used to secure the files by restricting any changes to the files. However, since the files will be posted on GETS and will be used for printing copies, the files **must not** be password protected and **must** allow printing.

4.2 Drawing Orientation

The final PDF drawing files must be displayed on the screen in the same direction that the users are intended to view them. This can be achieved by adjusting the setup of the plotter. If the drawing is not oriented properly after the conversion, it can be rotated manually within Adobe Acrobat.

4.3 Font Type

In order to avoid any problems during the conversion and to minimize the potential for font display errors, the fonts used for the production of construction drawings must be *PostScript* or *True Type fonts*.

4.4 Resolution

Since the PDF files will be used for printing, it is important that a proper resolution be selected. It is recommended to select 600 dots per inch (dpi).

4.5 Scale

When choosing the Plot scale in Adobe, it is important to choose the 1:1 scale to ensure the integrity of the scale from which the drawings were created in the CADD software.

5. SCANNING

Scanning is not recommended and should be done only when the drawing is not available electronically. When scanning a drawing, it is important that it be done in real size (scale 1:1) to ensure that the scale remains intact in subsequent printing. It is recommended that each scanned drawing be opened and verified to ensure that the resolution, scale and border are of an acceptable quality.

6. FINAL CHECKLIST

When the drawing file has gone through the PDF conversion, it is recommended to open it and verify the following:

- That the sheet size displayed is what was intended to be created (the size is viewable in the lower left corner of the drawing).
- That the orientation of the sheet is correct.
- That the line types, line weights and fonts match the CADD drawing.
- That the PDF file is in black and white.
- That each drawing is a single PDF file.
- That the PDF file is not password protected and printable.

If all the items are verified, the PDF file is useable

7. ADDITIONAL INFORMATION

For more information about the creation of PostScript and EPS files please refer to the User's Guide of the CADD software being used to produce the drawings. For more information about creating PDF file please refer to the Acrobat Distiller User's Guide and/or visit the Adobe Web site at www.adobe.com.