

**RETURN BIDS TO:  
RETOURNER LES SOUMISSIONS À:**  
**Bid Receiving Public Works and Government  
Services Canada/Réception des soumissions  
Travaux publics et Services gouvernementaux  
Canada**  
**Room 100,  
167 Lombard Ave.  
Winnipeg  
Manitoba  
R3B 0T6  
Bid Fax: (204) 983-0338**

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

**Proposal To: Public Works and Government  
Services Canada**

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.

**Proposition aux: Travaux Publics et Services  
Gouvernementaux Canada**

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

**Comments - Commentaires**

<b>Title - Sujet</b> Investment Analysis Report, CHARS	
<b>Solicitation No. - N° de l'invitation</b> EW003-152413/A	<b>Date</b> 2015-06-23
<b>Client Reference No. - N° de référence du client</b> CHARS-AANDC	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$WPG-016-9506	
<b>File No. - N° de dossier</b> WPG-5-38008 (016)	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2015-08-04</b>	
<b>Time Zone</b> <b>Fuseau horaire</b> Central Daylight Saving Time CDT	
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Hall, Marlene	<b>Buyer Id - Id de l'acheteur</b> wpg016
<b>Telephone No. - N° de téléphone</b> (204) 984-6423 ( )	<b>FAX No. - N° de FAX</b> (204) 983-7796
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA ATB PLACE NORTH, 5TH FLOOR 10025 JASPER AVE EDMONTON Alberta T5J1S6 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**

**Raison sociale et adresse du  
fournisseur/de l'entrepreneur**

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

**Issuing Office - Bureau de distribution**

Public Works and Government Services Canada - Western  
Region  
Room 100  
167 Lombard Ave.  
Winnipeg  
Manitoba  
R3B 0T6

Solicitation No. - N° de l'invitation

EW003-152413/A

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File No. - N° du dossier

WPG-5-38008

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wpg016

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## PART 1 - GENERAL INFORMATION

### 1.1 Statement of Work

The Statement of Work is detailed under Article 6.2 of the resulting contract clauses.

### 1.2 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The 2003 (2014-09-25) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days

Insert: 90 days

### 2.2 Submission of Bids

Bids must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.

#### 2.2.1 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least ten (10) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

### 2.3 Former Public Servant

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 FPSs, bidders 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 bids is completed, Canada will inform the Bidder 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 bid 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.

### **Former Public Servant in Receipt of a Pension**

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes** ( ) **No** ( )

If so, the Bidder must provide the following information, for all FPSs 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, Bidders agree that the successful Bidder'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](#).

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### **Work Force Adjustment Directive**

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes** ( ) **No** ( )

If so, the Bidder 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.

### **2.4 Enquiries - Bid Solicitation**

All enquiries must be submitted in writing to the Contracting Authority no later than 10 calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

### **2.5 Applicable Laws**

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Manitoba.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the bidders.

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## **PART 3 - BID PREPARATION INSTRUCTIONS**

### **3.1 Bid Preparation Instructions**

Canada requests that bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid (1 hard copy and 4 soft copies in pdf format on CD, DVD, SD or USB)

Section II: Financial Bid (1 hard copy)

Section III: Certifications (1 hard copy)

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

Canada requests that bidders follow the format instructions described below in the preparation of their bid:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, bidders should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

#### **Section I: Technical Bid**

In their technical bid, bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

#### **Section II: Financial Bid**

**3.1.1** Bidders must submit their financial bid in accordance with the Basis of Payment. The total amount of Applicable Taxes must be shown separately.

#### **3.1.2 Exchange Rate Fluctuation**

[C3011T](#) (2013-11-06), Exchange Rate Fluctuation

#### **Section III: Certifications**

Bidders must submit the certifications required under Part 5.

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## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

#### 4.1.1 Technical Evaluation

##### 4.1.1.1 Joint Venture Experience

- a) Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.

Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.

- b) A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.

- c) Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either:

- Contracts all signed by A;
- Contracts all signed by B; or
- Contracts all signed by A and B in joint venture, or
- Contracts signed by A and contracts signed by A and B in joint venture, or
- Contracts signed by B and contracts signed by A and B in joint venture.

that show in total 100 billable days.



- d) Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the bid solicitation period.

#### 4.1.1.2 Mandatory Technical Criteria

Refer to Annex F, 2.1 Mandatory Requirements.

#### 4.1.1.3 Point Rated Technical Criteria

Refer to Annex F, 2.2 Point Rated Criteria.

##### 4.1.1.3.1 Inuit Opportunities Considerations

In this requirement “**Inuit Opportunities Considerations**” will form part of a bidder’s technical bid, in accordance with the criteria listed in Annex D, Inuit Opportunities Considerations and Annex F, Evaluation Criteria.

#### 4.1.2 Financial Evaluation

SACC Manual Clause [A0220T](#) (2013-04-25), Evaluation of Price

#### 4.2 Basis of Selection - Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
  - a. comply with all the requirements of the bid solicitation; and
  - b. meet all mandatory criteria; and
  - c. obtain the required minimum points specified for each Point Rated criteria number R1, R2, R3 and R4 for technical evaluation. Point Rated Criteria R5 has no pass mark. The rating is performed on a scale of 130 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equals 130 and the lowest evaluated price is \$45,000 (45).

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Buyer ID - Id de l'acheteur  
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<b>Basis of Selection - Highest Combined Rating Technical Merit (70%) and Price (30%)</b>				
		<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>
<b>Overall Technical Score</b>		115/130	99/130	102/130
<b>Bid Evaluated Price</b>		\$55,000.00	\$50,000.00	\$45,000.00
<b>Calculations</b>	<b>Technical Merit Score</b>	115/130 x 70 = 61.92	99/130 x 70 = 53.31	102/130 x 70 = 54.92
	<b>Pricing Score</b>	45/55 x 30 = 24.55	45/50 x 30 = 27.00	45/45 x 30 = 30.00
<b>Combined Rating</b>		86.46	80.31	84.92
<b>Overall Rating</b>		1st	3rd	2nd

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## PART 5 - CERTIFICATIONS

Bidders must provide the required certifications and associated information to be awarded a contract.

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default in carrying out any of its obligations under the Contract, if any certification made by the Bidder is found to be untrue whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority may render the bid non-responsive or constitute a default under the Contract.

### 5.1 Certifications Precedent to Contract Award

The certifications listed below should be completed and submitted with the bid, but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will inform the Bidder 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 bid non-responsive.

#### 5.1.1 Integrity Provisions - Associated Information

By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Bid of Standard Instructions 2003. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

#### 5.1.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder 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](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 bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of contract award.

#### 5.1.3 Additional Certifications Precedent to Contract Award

##### 5.1.3.1 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

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If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

#### **5.1.3.4 Education and Experience**

SACC *Manual* clause [A3010T](#) (2010-08-16) Education and Experience

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## PART 6 - RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

### 6.1 Security Requirements

6.1.1 There is no security requirement applicable to this Contract.

### 6.2 Statement of Work

The Contractor must provide the items detailed under the "Statement of Work" at Annex "A".

### 6.3 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

#### 6.3.1 General Conditions

2010B (2014-09-25), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

### 6.4 Term of Contract

#### 6.4.1 Period of the Contract

The period of the Contract is from date of Contract to March 31, 2016 inclusive.

### 6.5 Authorities

#### 6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Marlene Hall  
Supply Specialist  
Public Works and Government Services Canada  
Acquisitions Branch  
100 - 167 Lombard Avenue  
Winnipeg, MB. R3B 0T6

Telephone: 204 230-0147  
Fax: 204 983-7796  
Email: [marlene.hall@pwgsc-tpsgc.gc.ca](mailto:marlene.hall@pwgsc-tpsgc.gc.ca)

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

## 6.5.2 Technical Authority (Departmental Representative)

The Technical Authority for the Contract is: *A contact to be named at date of contract issuance*

The Technical Authority name above is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority, however the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

## 6.5.3 Contractor's Representative

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Facsimile: \_\_\_\_\_

Email: \_\_\_\_\_

## 6.6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a [Public Service Superannuation Act](#) (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with [Contracting Policy Notice: 2012-2](#) of the Treasury Board Secretariat of Canada.

## 6.7 Payment

### 6.7.1 Basis of Payment – Firm Price

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm lot price(s), as specified in Annex B of \$\_\_\_\_\_. Customs duties are included or subject to exemption and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

### 6.7.2 Schedule of Milestones

The schedule of milestones for which payments will be made in accordance with the Contract is as follows: Refer to Annex B, Basis of Payment

### 6.7.3 Multiple Payments

SACC Manual clause [H1001C](#) (2008-05-12) Multiple Payments

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#### 6.7.4 SACC Manual Clauses

A9117C	2007-11-30	T1204-Direct Request by Customer Department
C0705C	2010-01-11	Discretionary Audit
C0710C	2007-11-30	Time and Contract Price Verification
D5328C	2014-06-26	Inspection and Acceptance

#### 6.8 Invoicing Instructions

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.
2. Invoices must be distributed as follows:
  - a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.
  - b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

#### 6.9 Certifications

##### 6.9.1 Compliance

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing associated information are conditions of the Contract. Certifications are subject to verification by Canada during the entire period of the Contract. If the Contractor does not comply with any certification, fails to provide the associated information, or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

##### 6.9.2 SACC Manual Clauses

A7017C	2008-02-12	Replacement of Specific Individuals
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#### 6.10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Manitoba.

#### 6.11 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the Articles of Agreement;
- (b) the general conditions 2010B (2014-09-25), General Conditions – Professional Services (Medium Complexity);
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) Annex C, Insurance – Specific Requirements;
- (f) Annex D, Inuit Opportunities Considerations;
- (g) Annex E, Inuit Opportunities Considerations - Milestone Report;

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(h) the Contractor's bid dated \_\_\_\_\_.

## **6.12 SACC Manual Clauses**

B9028C      2007-05-25      Access to Facilities and Equipment

### **6.12.1 Insurance – Specific Requirements**

The Contractor must comply with the insurance requirements specified in Annex C. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. For Canadian-based Contractors, coverage must be placed with an Insurer licensed to carry out business in Canada, however, for Foreign-based Contractors, coverage must be placed with an Insurer with an A.M. Best Rating no less than "A-". The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.



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**ANNEX "A" STATEMENT OF WORK**

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**For the development of an  
Investment Analysis Report  
to select a Facility Management Strategy  
for the Canadian High Arctic Research Station (CHARS)**

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## 1. Project Description

### 1.1 General

#### 1.1.1 Purpose of the Statement of Work (SOW)

- .1 Public Works & Government Services Canada (PWGSC) requires the services of an interdisciplinary consulting firm to provide technical advisory services to support the Investment Analysis Report of various Facility Management delivery models for the Canadian High Arctic Research Station (CHARS).
- .2 For reference purposes the term 'Consultant' and 'Contractor' are used interchangeably within the Statement of Work.

#### 1.1.3 Project Information

Project Information	
Project Title:	Investment Analysis Report to select a Facility Management Strategy for the Canadian High Arctic Research Station
Project Address:	Cambridge Bay, NU
Solicitation Number:	EW003-152413/A
PWGSC Project Number:	R.072098
PWGSC Contracting Officer:	Marlene Hall (marlene.hall@pwgsc-tpsgc.gc.ca)

### 1.2 Summary Of Consultant Specialties

#### 1.2.1 General

- .1 The Prime Consultant will provide a full consulting team composed of the following Key Specialists:
  - .1 Facilities Management Professional (Consultant Team Leader);
  - .2 Facilities Management Modeling Specialist;
  - .3 Facilities Management Benchmarking Specialist;
  - .4 Facilities Management Investment Analyst; and
  - .5 Facilities Management Risk Analyst.
- .2 The consultant team to be identified must include the following supporting Specialists:
  - .1 Economist;
  - .2 Isolated Buildings Facilities Management Specialist;
  - .3 Laboratory Buildings and Equipment Facilities Management Specialist;
  - .4 Campus Facilities Management Specialist;
  - .5 Building Life Cycle Analyst; and
  - .6 Quantity Surveyor.

### 1.3 Background Information

#### 1.3.1 Need and Goals

- .1 The Canadian High Arctic Research Station (CHARS) campus is currently under construction in Cambridge Bay, Nunavut. Upon substantial completion of each building, the Facilities Management will become an ongoing responsibility of Canada.

- .1 *An Investment Analysis Report to select a Facility Management Strategy for the Canadian High Arctic Research Station (IAR FMS)* is required to present the analysis and recommendation for long term Facilities Management of the CHARS campus.
  - .1 The IAR FMS is required to support Canada in determining the best VALUE FOR MONEY solution for, medium and long term Facilities Management of the CHARS campus, staff housing and supporting infrastructure.
  - .2 The IAR FMS is to include a list of the pros and cons of each strategy, complete with; risks, cost impacts and recommend the preferred strategy.
  - .3 The CHARS Operations and Maintenance (O&M) is projected to achieve LEED O&M certification requirements for the Main Research building and Field Maintenance building.

### 1.3.2 User department

- .1 **The User Department referred to throughout the Statement of Work (SOW) is Aboriginal Affairs and Northern Development Canada (AANDC). The User Department will be changed to POLAR – Knowledge Canada '(POLAR) the Departmental Corporation' in 2018.**
- .2 **AANDC Mission for CHARS:**
  - .1 The new Canadian High Arctic Research Station (CHARS) will provide the ability to:
    - .1 Address pressing issues in Canada's Arctic by conducting world-class research and delivering excellent and relevant science and technology;
    - .2 Complement the network of Arctic expertise and facilities across Canada's Arctic and the whole of the country;
    - .3 Promote partnerships and collaboration among the private, Aboriginal, academic, and public sectors both domestically and internationally;
    - .4 Work with Aboriginal peoples of Canada's Arctic and recognize the importance of traditional knowledge in advancing Arctic research;
    - .5 Integrate across disciplines and across activities – from problem identification, through research and development, to solutions;
    - .6 Ensure effective use of data, information, and technology through open and timely access and knowledge application; and
    - .7 Demonstrate leadership in sustainable technology applications for the Arctic.

### 1.3.3 Existing Conditions

- .1 **The Canadian High Arctic Research Station (CHARS) campus project is completing the Construction Document stage of project development, with early packages under construction. CHARS project is being constructed under a Construction Management Construction Service delivery model with multiple tender packages.**
- .2 **The CHARS campus is composed of multiple buildings that will be substantially complete and ready for occupancy between 2015 and 2017. The campus is composed of building programs that have distinct Facility Management requirements. Included are:**
  - .1 Two (2) Triplexes: two storey buildings with three self contained living units, supporting four bedrooms, two bathrooms and kitchen/dining/eating area, for a total of six self contained living units. Anticipated occupancy is September 2015. Assume a one (1) month average churn rate;

- .2 Field & Maintenance building (FMB), with anticipated occupancy November 2016, supports;
    - .1 The operational/ functional needs and maintenance of the CHARS CAMPUS;
    - .2 Seasonal and mobile “plug and play” laboratories;
    - .3 Functional workshop activities; and
    - .4 Maintenance and Logistics office space;
  - .3 Main Research building (MRB), including public gathering spaces, research laboratories, supporting office space, media studio, and limited commercial revenue generating operations. Anticipated occupancy is November 2017;
  - .4 Outdoor storage, parking and vehicular access facilities are included on the site to support program and occupancy requirements; and
  - .5 Future Dormitory with a mix of apartments with 2 person and 4 person accommodation to support short term researchers. Anticipate construction in a future time to accommodate 50 people in hoteling operations model.
- .3 Management of Leased Staff Housing within the Cambridge Bay community have complementary minimal Facilities Management requirements due to Landlord contractual obligation assuming an average one (1) year churn rate. Assumptions for the Investment Analysis Report will be finalized during the Project Identification Service, as a reference, included in Leased Staff Housing are:**
- .1 Numerous Staff Housing units are to be built to lease between 2015 and 2017 for 25 year leases. Staff Housing is a combination of three (3), two (2) and / or one (1) bedroom(s). The first six units are anticipated to be constructed for the spring of 2016. The 2016 units are to be composed of three (3) - bedrooms; and
  - .2 Additional Staff Housing units of various sizes and styles are required to be procured from 2018 to 2030. The method and scheduling of additional Lease housing procurement is currently being evaluated and confirmed by AANDC/CHARS.

#### 1.3.4 Constraints and Challenges

- .1 The Consultant will be required to become familiar with the project site, available Construction Documents and obtain local information as required.
- .2 All site visits, if required, must be arranged through the Departmental Representative to ensure the objective meets CHARS/AANDC's communication with the community.
- .3 Diligent management within the Consultant team is required to ensure Consultant contract is met within the project schedule.
- .4 Comparable facilities are not available within the Nunavut context to support benchmarking of options.
- .5 As the construction of the CHARS campus of buildings is currently under construction the Shop Drawing process will not be complete at the commencement of this “Investment Analysis to select a Facilities Management Strategy for the CHARS “. Facilities Management requirement assumptions for the development of this Investment Analysis Report will be based upon available documentation at the project commencement. These assumptions need to be confirmed in the Project Identification Service.

- .6 The Geographical location of the facility impacts available labour market and supplies to support ongoing Facilities Management. Impacts include, but are not limited to:**
  - .1 Deliveries are able to be shipped by barge or air. Barges run between July and September;
  - .2 Local population is approximately 1600;
  - .3 Limited heavy equipment available in the community; and
  - .4 Limited specialized certification for trades within the local community.
- .7 The scope that will be under the Facilities Management contracts is within the Nunavut Settlement Area as defined in the Nunavut Land Claim Agreement (NLCA). All Facilities Management strategies must consider the contractual requirement to develop and support NLCA Section 23 and 24.**
- .8 Effects of climate change are not foreseeable at the present time.**

## **1.4 Summary of Considerations**

### ***1.4.1 Investment Analysis Report to select a Facility Management Strategy for the Canadian High Arctic Research Station***

- .1 The project requires the development of an Investment Analysis Report for various Facilities Management delivery models for the CHARS campus and supporting Staff Housing. Note: the Technical operations and maintenance of the Laboratories within the Science Program is not included in this Statement of Work but considerations will have to be implemented.**
- .2 The report will provide a financial comparison of the proposed Facilities Management delivery models over the following two (2) timelines:**
  - .1 0-30 years; and
  - .2 31-100 years.
- .3 In the context of this study, the Facilities Management for the CHARS campus is to include the following:**
  - .1 The CHARS campus is designed for a 30 years lifecycle;
  - .2 Preventative maintenance and minor repair (consisting of scheduled tasks that sustain the level of the asset's service during the CHARS campus lifecycle);
  - .3 Unscheduled maintenance (consisting of service calls, emergency response and other unanticipated tasks);
  - .4 Project Delivery services to support improvements, with an assumed project value less than \$250,000 based upon 2015 costs, that extend the life of the asset or support meeting operational requirements;
  - .5 Develop, Implement and Maintain an Asset Management Plan, considering;
    - .1 Sound business practices and/or Best Practices for Sustainable Infrastructure;
    - .2 Applicable Federal Government wide policies and standards;
    - .3 The economic value of the asset;
    - .4 Maintenance of the asset including repair and replacement of major components (consisting of tasks that extend the lifetime of components and reset the schedule for preventative maintenance and minor repairs); and
    - .5 Availability of potential service providers to support Facilities Management requirements.
  - .6 Pest control;
  - .7 Daily to monthly operations of the facility (consisting of tasks that ensure a safe, clean, operable and sustainable working environment);
  - .8 Managing the third party commercial tenant occupancies within the Main Research Building;

- 
- .9 Staff Housing including Triplexes: cleaning, key management, linen service in-between tenants; and
  - .10 Support achieving LEED Existing Buildings (EB) operations and maintenance, for the Field Maintenance and Main Research buildings or demonstrate able equivalent.
- .4 In the context of this study, the Facilities Management for the support of additional Staff Housing units is to include the following:**
- .1 The sixteen (16) leased Staff Housing units, with leases extending until 2040 if all options for renewal are considered:
    - .1 Six 3 – bedroom units anticipated April 2016;
    - .2 10 housing units anticipated 2017;
  - .2 The two (2) 3-bedroom leased housing units, with leases expiring in 2018;
  - .3 Future, additional, Staff Housing units are required after 2018 for a minimum of 25 years;
  - .4 All services required to manage Staff Housing units in-between tenants, including but not limited to;
    - .1 Cleaning;
    - .2 Key management;
    - .3 Linen service; and
    - .4 Emergency Services.
  - .5 In support of this study, Facilities Management delivery models are to be developed and analyzed within the *Investment Analysis Report to select a Facility Management Strategy for the Canadian High Arctic Research Station* program. The assessment of all potential Facilities Management delivery models is required to support decision making. The exact Facilities Management delivery models to be assessed are to be confirmed with the Proponent's input during the Project Identification. The following six (6) Facilities Management delivery models are a starting point to develop a **minimum** of four (4) viable potential Facility Management delivery models to be analyzed:
    - .1 Real Property Service Delivery (RPn) for a turnkey contract between AANDC and a single service provider. In this model AANDC would prepare an RFP to retain a service provider to support all Facilities Management requirements for the CHARS program. This RFP would be based upon the RPn, currently used by PWGSC, customized to support the CHARS location and restrictions;
    - .2 AANDC to develop an internal Facilities Management team supplemented with local contracts for multiple smaller scopes of services. In this model AANDC would have an internal team of Facilities Management staff who ensure effective Facilities Management for the CHARS campus. This internal team would retain services from local service providers as required and where possible.
    - .3 Partnership or Agreements with local & territorial levels of government to ensure delivery of Facilities Management services. In this model AANDC would set up a partnership with local levels of government to share Facilities Management services in a larger turnkey Real Property Service Delivery contract. Negotiations would be established between AANDC and other governments to increase the volume of services required and support reduced price while supporting Nunavut Land Claims Agreement requirements.
    - .4 Partnership with other federal government departments (i.e. DND, DFO, RCMP) to ensure delivery of Facilities Management services. Similar to partnership with local and territorial levels of government, in this model, AANDC would set up a partnership with other federal government departments to procure Facilities Management services within the territory context.

- .5 Sale-lease-back upon substantial completion of the CHARS campus. In this model, upon completion of the CHARS project, AANDC would retain PWGSC to procure the sale of the campus as a Sale-Lease back asset. As a part of the lease the owner would ensure all Facilities Management is addressed for the duration of the lease. A long term (25-50 year) lease could be procured, transferring Canada from the responsibility of maintaining the facility from Canada to the Land-lord with a defined cost that is predicted for the duration of the lease.
  - .6 RPN (Alternate Forms of Delivery (AFD) managed through PWGSC and Asset and Facility Management Services (AFMS) team). In this model, AANDC, or POLAR, would be added to a new list of assets included in the RPN contract issued by PWGSC in the future to support all Facilities Management requirements for the CHARS program.
- .5 Build upon the CHARS Post Design Investment Analysis Report for Operation and Maintenance” to develop and analyze Facility Management delivery models. The Investment Analysis to select a Facilities Management Strategy for the CHARS must consider the following:**
- .1 Access to and interest of available Facilities Management services/support/labour/service providers;
  - .2 Local business opportunity to support CHARS Facilities Management;
  - .3 Potential integrated platforms for Facilities/Asset Management that is compatible with the future financial and facility operations platform for CHARS operations and connectivity capabilities;
  - .4 Projected infrastructure support for Operation and Maintenance issues will likely be through a centralized National Service Call Centre operated by the Government of Canada;
  - .5 Compliance with LEED O&M and/or other accepted recognized system for the CHARS campus;
  - .6 Continued compliance with Occupational Health and Safety requirements for Crown facilities, including the:
    - .1 Canada Labour Code;
    - .2 Canada Occupational Health and Safety Regulations;
    - .3 Treasury Board Secretariat’s Occupational Safety and Health Policy, and supporting instruments;
    - .4 National Joint Council’s Occupational Health and Safety Directive; and
    - .5 All other applicable Acts, Regulations, Standards and Codes and local bylaws.
  - .7 Assessment of each Facility Management delivery model’s ability to respond to the operational and functional needs of CHARS, as identified in the Functional Program;
  - .8 Assessment of each Facility Management delivery model’s endurance and serviceability for its unique purpose by:
    - .1 Fully integrating the Facilities Management of all components and systems, including architectural, civil, structural, all mechanical, all electrical, IT, multimedia, and security design, equipment and furniture, interior finishes, etc.; and
    - .2 Providing Facilities Management access while respecting user security requirements;
    - .3 Identifying Risks and associated costs impacts in proceeding with each Facility Management delivery model;
    - .4 Identifying funding risks due to geographical constraints while considering federal funding cycles;
    - .5 Considering the impact to staffing/Human Resource requirement projection for the short (0-30 years) and long term (31-100 years) for AANDC/POLAR to support Facilities Management.



## **1.5 Objectives**

### **1.5.1 General Objectives**

- .1 **The *Facilities Management Investment Analysis Report* for the CHARS campus is to provide an analysis on the various Facilities Management delivery models to support Canada in determining the best VALUE FOR MONEY solution for long term Facilities Management of the CHARS campus.**

### **1.5.2 Project Delivery**

- .1 **Deliver the project within the key milestones and according to the detailed project schedule listed in 1.6.**
- .2 **Ensure that each Consultant team member understands the project requirements, for seamless delivery of the required services.**
- .3 **Ensure a quality management plan that includes rigorous internal quality reviews.**

## **1.6 Schedule**

### **1.6.1 General**

- .1 **Deliver the project in accordance with the project milestone listing identified below.**
- .2 **Prepare a Project Schedule, in accordance with the milestone list. Some components of the work are expected to occur in parallel.**

### **1.6.2 Anticipated Milestone Dates**

Project Phase	Milestone Completion Date
Consultant Contract Award	tbd
Project Identification Submission - Draft	3 weeks
Client Review	2 weeks
Project Identification Submission - Final	1 weeks
Client Review	2 weeks
Investment Analysis to select a Facilities Management strategy (IAR FM)- Draft	6 weeks
Client Review	2 weeks
IAR FM Final Draft	4 weeks
Client Review	2 weeks
IAR FM- Final Report	22 weeks after Consultant Contract Award

## **1.7 Existing Documentation**

### **1.7.1 Available for the Consultant**

- .1 **CHARS Design Drawings as found at the following web site:  
<http://www.science.gc.ca/default.asp?lang=En&n=74E65368-1>**

### **1.7.2 Available for the Consultant upon project award**

- .1 **Issued for Construction (IFC) drawings and specifications will be available for the buildings.**
- .2 **The Consultant will be provided with, but not limited to, the following;**



- .1 CHARS Post Design IAR – Facility Life Cycle – Operation and Maintenance Report, 2015;
- .2 Scaled pdf IFC drawings of the Campus of buildings, 2015;
- .3 Pdf IFC specifications for the Campus of buildings, 2015;
- .4 Design Development Report Canadian High Arctic Research Station, including Appendix D – Basis of Design – SNC-Lavalin, 2014;
- .5 CHARS Business Case
- .6 Lease tender documents for the leased housing, 2014;
- .7 Waste Management Plan Canadian High Arctic Research Station (CHARS), 5/12/2014;
- .8 Laboratory Pollution Prevention Plan (adapted from UBC Laboratory Pollution Prevention and Hazardous Waste Management Plan);
- .9 Water Generation Estimation for CHARS; and
- .10 NCR #5508141-v1A Waste Type Matrix.

#### **1.7.3 Disclaimer**

- .1 Reference information will be available in the language in which it is written.
- .2 The documentation may be unreliable and is offered, “as is” for the information of the Consultant.

### **1.8 Codes, Acts, Standards, Regulations**

#### **1.8.1 General**

- .1 **The Consultant must identify, analyze and design the project in accordance with the requirements of all applicable Legislation, Regulations, Codes, Standards, Guidelines and local bylaws.**
  - .1 The applicability of various Legislation, Regulations, Codes, Standards, Guidelines and local bylaws arise out of direct and indirect references in documents which apply to Federal buildings, including but not limited to the Canada Labour Code, Canada Occupational Health and Safety Regulations, applicable Health Canada Standards and Guidelines, and National Fire Code of Canada.
  - .2 The consultant team must be fully versed with the legislation and requirements that are unique to Federal Government buildings in Canada.

## **2. Required Services**

### **2.1 General Requirements**

#### **2.1.1 Services**

- .1 **Project Identification Service; and**
- .2 **Facilities Management Investment Analysis Service.**

### **2.2 Project Review and Approval**

#### **2.2.1 General**

- .1 **Comply with all applicable laws and regulatory requirements as required by the General Conditions of the Contract.**

#### **2.2.2 Reviews, Approvals and Presentations**

- .1 **Project delivery team approval for this project includes PWGSC Professional & Technical Team and User Department reviews and approval.**

- .1 The purpose of this review is to assess technical quality;
- .2 All submissions will be reviewed;
- .3 Expected turnaround time is 2 weeks;
- .2 To support each review, the Consultant is to provide complete submission including any follow-up submissions and/or responses to previous review comments.**

## **2.3 Project Identification Service**

### **2.3.1 General**

- .1 The Consultant Team will review and analyze all available project information, consult with the Departmental Representative, and deliver a comprehensive Project Identification Report.**

### **2.3.2 Scope and Activities**

#### **.1 The Consultant must:**

- .1 Participate in and minute meetings held every second week or as required;
- .2 Analyze site conditions and context to support the documentation of any conditions that could impact project delivery and report the results to the Departmental Representative;
- .3 Review all existing documents and material related to the project, including;
  - .1 Issued for Construction drawings and specifications for the CHARS campus of buildings;
  - .2 CHARS Post Design IAR – Facility Life Cycle – Operation and Maintenance Report, 2015;
  - .3 Copies of all relevant Shop Drawings and other Contractor submittals approved by the Consultant to date during the construction;
  - .4 Potential environmental impacts in the application of the Canadian Environmental Protection (CEP) Act and supporting regulations; and
  - .5 Other supplied documents.
- .4 Assess and present viable Facilities Management delivery models to support AANDC requirements.
- .5 Identify any conflicts or potential additional work and indicate the impact on project scope, schedule and costs;
- .6 After the project Start-up meeting, organize and chair a Workshop with members from the Consultant team, AANDC, POLAR, and PWGSC to identify, discuss, review and confirm;
  - .1 The Project Description outlined in Section 1 of this SOW;
  - .2 Benchmarking considerations/options;
  - .3 Facilities Management delivery models to be included in the IAR to select a Facility Management Strategy for the CHARS analysis;
  - .4 Target industry standard Operations and Maintenance standards to ensure performance levels. i.e. LEED O&M Gold vs LEED O&M Silver.
  - .5 Constraints and Challenges in delivering Facilities Management services within the Cambridge Bay context for both the CHARS campus of buildings and Staff Housing;
  - .6 Long term operations and services objectives for the CHARS campus of buildings;
  - .7 Housing operation models for triplexes, Staff Housing and future Dormitory; and
  - .8 Variable expenses and associated risks for the Facilities Management of the CHARS campus.

### 2.3.3 Deliverables

#### .1 The Consultant must prepare and submit;

- .1 Minutes and Agendas;
- .2 Project Milestone Schedule, updated minimum monthly;
- .3 Project Identification Report submissions (Draft and Final) for review and acceptance by the Departmental Representative. Include the following:
  - .1 Confirmation of the Project Description considering Section 1 of this SOW;
  - .2 Confirmation of facilities to be managed under future delivery model;
- .3 Facilities Management scope to be assessed within each delivery model
- .4 Operations and Maintenance assessment tools (i.e. BOMA Best Level 2 or LEED O&M Gold or alternate) complete with justification;
- .5 Long term operations and services objectives for the CHARS campus of buildings and Staff Housing;
- .6 Constraints and Challenges in the delivery of Facilities Management to the CHARS campus of buildings and Staff Housing;
- .7 Staff Housing Operation modes/assumptions;
- .8 Description of four (4) distinct and viable Facilities Management delivery models to be assessed, complete with justification of why others presented are not to be assessed;
- .9 Identification of benchmarking facilities for comparable assessments;
- .10 Fixed and variable expense categories to be assessed;
- .11 Variable expense risks;
- .13 Table of Contents/Outline for the *Facilities Management Investment Analysis Report*; and
- .14 Outstanding information required by the Consultant team.

## **2.4 FACILITIES MANAGEMENT Investment Analysis Service**

### 2.4.1 General

- .1 **The Consultant Team will review and analyze all available project information, consult with the Departmental Representative, and deliver a comprehensive *Facilities Management Investment Analysis Report*.**

### 2.4.2 Scope & Activities

#### .1 The Consultant must:

- .1 Participate in and minute monthly meetings;
- .2 Develop a Private Industry company list and survey questionnaire, for approval by Departmental Representative, to determine viability and interest in potential service requirements to support each Facility Management delivery model assessed.
  - .1 Solicit and analyze Private Industry survey questionnaires in support of the project.
- .3 Prepare a *Facilities Management Investment Analysis Report* documenting the comparison of the delivery models that were agreed upon during Project Identification. The report is to be:
  - .1 Pending discussions during the Project Identification Phase, the report will compare four (4) delivery models;
  - .2 Solicit and analyze Private Industry survey questionnaires in support of the project.
  - .3 Develop each delivery model in sufficient detail to clearly indicate all key elements in the process, including, (but not limited) to details outlined herein, and as agreed to in the Project Identification Service:
    - .1 Provide the advantages and disadvantages/risks analysis for each model;
    - .2 Prepare a Substantive Cost Estimate for each option;

- .3 Include adjusted financial analysis to present value terms;
- .4 Conduct Benchmarking analysis to develop supporting documentation in the Analysis of each delivery model. Including but not limited to:
  - .1 Developing a process of comparing the cost in this case to other similar assets/facilities;
  - .2 Assessing the relevance of similar assets/facilities to the proposed solution; and
  - .3 Documenting comparables to ensure comparison has been thoroughly vetted to ensure proposed impact if justified.
- .5 Solicit interest of potential proponents to support viability in the analysis of each Facilities Management Delivery model;
- .6 Compare each delivery model for the identified terms of services;
- .7 Provide a recommendation on the best value option that Canada should pursue.
- .4 Translate Final Report into French.

#### 2.4.3 Deliverables

##### .1 The Consultant must provide:

- .1 Minutes and Agendas;
- .2 Project Milestone Schedule, updated minimum monthly;
- .3 Draft and final survey questionnaire;
- .4 Updated Monthly Reports;
  - .1 Updated Project Schedule;
  - .2 Updated Decision Log;
  - .3 Report progress/status update;
- .5 *Facilities Management Investment Analysis Report*, for review and acceptance by the Departmental Representative;
  - .1 Include a detailed Substantive Estimate for each option
  - .2 Include a financial analysis to present value terms;
  - .3 Include Risk Analysis:
  - .4 Identify deviations that may affect project assumptions and conclusions and recommend corrective/mitigation measures.
  - .5 Include a recommendation supported by a documented analysis that considers all aspects agreed to in the Project Identification Service.
  - .6 Private Industry List of Company and Survey Questionnaire results;
- .6 Submit the *Facilities Management Investment Analysis Report* for review. Incorporate PWGSC and user group comments for reviews into subsequent submissions. Assume the submission of:
  - .1 Draft Report;
  - .2 Final Draft Report; and
  - .3 Final Report (English and French).

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### **3. Project Administration**

#### **3.1 General Requirements**

##### **3.1.1 The Consultant must:**

- .1 Obtain written authorization from the Departmental Representative before proceeding from one phase of work to the next phase of a project.
- .2 Coordinate all services with the Departmental Representative.
- .3 Deliver each project utilizing best practices in support of User Department needs, respecting the approved financial budget, schedule, scope, quality energy budget.
- .4 Establish a cohesive functional partnership and open communication between all members of the project delivery team throughout all phases of the project life.
- .5 Provide a written response to all PWGSC comments included in Quality Assurance reviews conducted throughout the design of the project.
- .6 If any alterations are required during the development of the design, analyse the impact on all project components and resubmit for approval before proceeding further.
- .7 Provide continuous and comprehensive documentation of the project at all stages of the project implementation.
- .8 Ensure continuity of key personnel and maintain a dedicated, Certified, working team for the life of the project.

#### **3.2 Service Delivery for Project**

##### **3.2.1 The Consultant must:**

- .1 Deliver the project to be within the key milestones, according to the established project schedule.
- .2 Ensure that each Consultant team member:
  - a. Understands the project requirements, for seamless delivery of the required services;
  - b. Functions as a cohesive partnership with open communication between all members of the project delivery team throughout all phases of the project life;
  - c. Function as an integrated and focused team with an in-depth understanding and collective „buy-in“ of the project requirements, scope, budget and scheduling objectives.
- .3 Deliver the work in a professional manner during all phases of the project, employing best practices for budget, schedule, quality, and scope management.
- .4 Maintain continuity of key personnel and maintain a dedicated working team for the life of the project.

#### **3.3 Required Services Standards**

##### **3.3.1 Technical Reports: Purpose**

- .1 This section provides direction and standards for the preparation of reports delivered to PWGSC during all the various stages of project delivery and for specific services such as investigations, studies, analysis, strategies, audits, surveys, programs, plans, etc.
- .2 Technical Reports are official government documents, which are typically used to support an application for approval or to obtain authorization or acceptance and as such they must be

complete, clear and professional in appearance and organization, with proper reference to related parts and contents in the report. The Technical Reports must:

- a. Clearly outline the intent, objectives, process, results and recommendations;
- b. Present the flow of information and conclusions in a logical, easy to follow sequence;
- c. Be in written narrative, graphic, model (traditional and / or computer generated). photographic format, which can be web enabled;
- d. Ensure that all pages are numbered in sequence; and
- e. Be printed double-sided, if hard copies are produced.

### 3.3.2 Standard for PWGSC Technical Reports

.1 Standard practice for the organization of technical reports requires:

- a. A cover page, clearly indicating the nature of the report, the date, the PWGSC reference number and who prepared the report;
- b. A Table of Contents; An Executive Summary;
- c. The body of the report is to be structured such that the reader can easily review the document and locate, respond to and /or reference related information contained elsewhere in the report; and
- d. Appendices used for lengthy segments of the report, supplementary and supporting information and / or for separate related documents.

.2 The report content must:

- a. Ensure that the executive summary is a true condensed version of the report following the identical structure, including only key points and results / recommendations requiring review and / or approval;
- b. Use a proper numbering system (preferably legal numbering), for ease of reference and cross-reference; the use of „bullets" is to be avoided;
- c. Use proper grammar, including using complete sentences, in order to ensure clarity, avoid ambiguity and facilitate easy translation into French, if required; the use of undefined technical terms, industry jargon and cryptic phrases are to be avoided; and
- d. Be written as efficiently as possible, with only essential information included in the body of the report and supporting information in an appendix if needed.

### 3.3.3 Language

.1 The final **Facilities Management Investment Analysis Report** submission is to be in both English and French.

### 3.3.4 Media

- .1 The Consultant must not respond to any media inquiry.
- .2 The Consultant must direct all media requests to the Departmental Representative.

### 3.3.5 Lines of Communication

- .1 In general, communications will be through the Departmental Representative, unless otherwise directed in writing by the Departmental Representative. This includes formal contact between the Consultant, PWGSC and the User Department.
- .2 Direct communication between members of the PWGSC Project Team on routine matters may be required for the resolution of technical issues. This communication must not alter

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project scope, budget or schedules unless confirmed in writing by the Departmental Representative.

### **3.3.6 Meetings**

- .1 The Departmental Representative will arrange meetings through the project, with representatives from:
  - a. The User Department;
  - b. PWGSC;
  - c. The Consultant and supporting team; and
  - d. Guests as deemed relevant to the project discussion.
- .2 Meetings are to be held as follows:
  - a. Bi-weekly meetings – using either web ex, or presence in PWGSC offices that support video conferences; and
  - b. Workshops/Working Sessions (anticipate 2) – in Gatineau, QC.

### **3.3.7 Consultant Responsibilities**

- .1 The “Consultant Team” includes the Consultant’s staff, sub-consultants and specialists.
  - a. This team must maintain its expertise for the duration of the project.
  - b. The team must include qualified professionals, with extensive relevant experience, capable of providing all required services.
  - c. Team members may be qualified to provide services in more than one discipline.
  - d. The Consultant may expand or revise the team to include additional disciplines or for replacement of departing individuals.
- .2 The Consultant is responsible for:
  - a. Obtaining Departmental Representative acceptance for each project phase before proceeding to the next phase;
  - b. Accurately communicating scope, budget, and scheduling issues to staff, sub-consultants and specialists;
  - c. Co-ordinating the internal quality assurance process and ensuring that submissions of sub-consultants are complete and signed-off by reviewers;
  - d. Coordinating and direct the work of all team activities, sub-consultants and specialists; and
  - e. Project delivery in support of the SOW.
- .3 Attend meetings includes the following:
  - a. Record the issues and decisions;
  - b. Prepare and distribute minutes within three working days of the meeting;
  - c. Ensure all meetings are green i.e. using electronic documents or double-sided hard copies;
  - d. Ensure sub-consultants attend required meetings;
- .4 The Consultant must adjust the documentation to meet the requirements of these authorities.

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### **3.3.8 PWGSC Responsibilities**

- .1 Administration
  - a. PWGSC administers the project and exercises continuing control over the project during all phases of development.
  - b. The following administrative requirements apply during all phases of the project delivery.
- .2 Reviews
  - a. PWGSC will review the work at various stages and reserves the right to reject unsatisfactory work at any stage;
  - b. If later reviews show that earlier acceptances must be withdrawn, the Consultant must re-design and re-submit at no extra cost;
  - c. Acceptance;
    - i. PWGSC acceptance of submissions from the Consultant simply indicates that, based on a general review, the material complies with governmental objectives and practices, and meets overall project objectives; and
    - ii. Acceptance does not relieve the Consultant of professional responsibility for the work and for compliance with the contract.
- .3 PWGSC Departmental Representative
  - a. The Departmental Representative is directly responsible for:
    - i. The progress and administration of the project, on behalf of PWGSC.
    - ii. Day-to-day project management and is the Consultant's single point of contact for project direction.
    - iii. Accepting or rejecting work based upon work requirements identified in the Statement of Work.
- .4 PWGSC Professional & Technical Resources Team
  - a. Provides professional advice and quality assurance reviews of consultant deliverables by Architectural, Engineering and Maintenance Management professional disciplines;
  - b. Offers expert technical advice on related project issues; and
  - c. Participates regularly in project phases and may attend meetings on behalf of the Departmental Representative.

### **3.3.9 User Department Responsibilities**

- .1 The User Department Project Leader
  - a. Is accountable for the expenditure of public funds and delivery of the project in accordance with terms accepted by the Treasury Board;
  - b. Reports to senior User Department executive management; and
  - c. Will play several critical roles for the successful implementation of the project, including coordination of the quality, timing and completeness of information and decisions relating to issues related to the functional performance of the facility.



## ANNEX "B" BASIS OF PAYMENT

During the period of the contract, the Work performed in accordance with the Contract, the Contractor will be paid as specified below.

- 1.1 Firm all inclusive pricing must include all costs associated with providing the service in accordance with the Statement of Work in Annex A. The firm all inclusive price must include all payroll, overhead costs and profits to complete the work.
- 1.2 GST, if applicable, is not included and is to be shown as a separate item on any resulting invoice. Payment will be made in accordance with the following pricing.
- 1.3 All prices and costs quoted must be in Canadian Dollars (CAD).
- 1.4 Canada will not accept any travel and living expenses incurred by the Contractor as a consequence of any relocation required to satisfy the terms of the Contract.

FIRM ALL INCLUSIVE PRICING, GST ( if applicable) EXTRA		
Item	Description	Firm All Inclusive Pricing
1.	In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid firm all inclusive pricing in accordance with Annex A, Statement of Work and Annex B, Schedule of Milestones.	\$ _____

SCHEDULE OF MILESTONES			
This schedule of milestones represents the Deliverables as set forth in the Statement of Work.			
Milestone No.	Deliverable	Firm Amount	Milestone Due Date (from date of award)
Milestone 1	Project Identification Submission – Draft	10%	3 weeks
	<i>Review and acceptance</i>		2 weeks
Milestone 2	Project Identification Submission – Final	5%	1 weeks
	<i>Review and acceptance</i>		2 weeks
Milestone 3	Investment Analysis to select a Facilities Management strategy (IAR FM) – Draft	35%	6 weeks
	<i>Review and acceptance</i>		2 weeks
Milestone 4	IAR FM Final Draft	25%	4 weeks
	<i>Review and acceptance</i>		2 weeks
Milestone 5	IAR FM Final Report <i>Review and acceptance</i>	Balance	Approximately 22 weeks after Consultant Contract Award.

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## **ANNEX "C"    INSURANCE – SPECIFIC REQUIREMENTS**

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### **A)      Errors and Omissions Liability Insurance**

1. The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
2. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
3. The following endorsement must be included:

Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

### **B)      Commercial General Liability Insurance**

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
2. The Commercial General Liability policy must include the following:
  - a. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
  - b. Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
  - c. Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
  - d. Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
  - e. Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
  - f. Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
  - g. Employees and, if applicable, Volunteers must be included as Additional Insured.
  - h. Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)

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File No. - N° du dossier  
WPG-5-38008

Buyer ID - Id de l'acheteur  
wpg016  
CCC No./N° CCC - FMS No./N° VME

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- i. Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
  - j. Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
  - k. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

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## **ANNEX "D" INUIT OPPORTUNITIES CONSIDERATIONS**

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The Inuit Opportunity Consideration and any relevant associated plans thereof as described in Annex F – Point Rated Criteria, should be in sufficient detail to allow the Contracting Authority and Project Authority to assess the quality, value and the probability of meeting the objectives therein.

The Inuit Opportunity Consideration may include the following:

- (a) a clear statement of the Nunavut Land Claims Agreement content that the Contractor proposes to provide. This could be expressed in dollars and as a percentage of the total contract value.
- (b) a Human Resources Plan that details how (if any) the Contractor and/or its contractor(s) and/or sub-contractor(s) intends to maximize the use of Inuit employment. The Human Resources Plan should address how the employment of Inuit people (if any) would be managed and should address:
  - (i) details on the work to be carried out for each position to be filled by an Inuit person;
  - (ii) strategies for recruitment of Inuit persons, which could include engagement with the Canadian High Arctic Research Station (CHARS) - Cambridge Bay Steering Committee and reference to the Nunavut Tungavik Inc Inuit Firm Registry Data Base at <http://inuitfirm.tunngavik.com/>;
  - (iii) strategies for retention of Inuit persons;
- (c) a Supply and Services Plan that details how (if any) the Contractor and/or its contractor(s) and/or its subcontractor(s) intend to maximize the Inuit provision of goods or services. The Supply and Services Plan should break out and separately account for the details on the supplies, equipment and services (if any) procured from Inuit Suppliers or Inuit Firms.

For purposes of interpretation:

"Inuit firm" must be a firm, the name of which appears on the most current list of Inuit firms created in accordance with the requirements of Article 24.7.1 of the Agreement Between The Inuit of the Nunavut Settlement Area and Her Majesty the Queen in Right of Canada; and

"Inuit" must be a person whose name appears on the most current Inuit Enrolment List created in accordance with the requirements of Article 35.2.1 of the Agreement Between The Inuit of the Nunavut Settlement Area and Her Majesty the Queen in Right of Canada.

"deliveries to" means "goods delivered to, and services performed in".

For more information on the contents of these lists, please contact:

Nunavut Tunngavik Incorporated  
P.O. Box 280  
Rankin Inlet, N.W.T. X0C 0G0

Telephone #: (867) 645-3199  
Facsimile #: (867) 645-3452

### **Evaluation and Assessment - Submission Requirements**

In order for a bid to be assigned points for representations made in respect of any criterion (hereinafter collectively referred to as the "Inuit Opportunities Considerations"), appropriately documented evidence of conformance with the stated objective of the criterion must be provided with the tender submission.

The Minister reserves the right to verify any information provided in the "Inuit Opportunities Considerations" and that untrue statements may result in the tender being declared non-responsive.

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## **Treatment of Representations and Warranties**

The Bidder acknowledges that:

- a) the Minister relies upon the "Inuit Opportunities Considerations" to evaluate bids; and
- b) the "Inuit Opportunities Considerations" must become covenants under any contract(s) resulting from this solicitation.

**The Inuit Opportunities Consideration will be verified using the report format provided at Annex E.**

## **Nunavut Land Claims Agreement – Evaluation Criteria**

The benefits that apply to this procurement are contained in Part 6 - Bid Criteria of Article 24 - Government Contracts of the Nunavut Land Claims Agreement (NLCA), section:

**24.6.1** Whenever practicable, and consistent with sound procurement management, and subject to Canada's international obligations, all of the following criteria, or as many as may be appropriate with respect to any particular contract, shall be included in the bid criteria established by the Government of Canada for the awarding of its government contracts in the Nunavut Settlement Area:

- a. the existence of head offices, administrative offices or other facilities in the Nunavut Settlement Area;
- b. the employment of Inuit labour, engagement of Inuit professional services, or use of suppliers that are Inuit or Inuit firms in carrying out the contracts; or
- c. the undertaking of commitments, under the contract, with respect to on-the-job training or skills development for Inuit.

## ANNEX "E" INUIT OPPORTUNITIES CONSIDERATIONS - MILESTONE REPORT

The Contractor hereby agrees to provide information on Inuit Opportunities Considerations involvement, as per the format below:

<b>Supplier Name:</b>		<b>Contract Name:</b>	
<b>Contract Number:</b>		<b>Milestone Period:</b>	

Record of involvement for this milestone report period:

<b>IOC Opportunity</b>	<b>Provide location, list, detail of work / service (use separate page if needed)</b>	<b>Total Hrs / Dollars (IOC and Non-IOC), if applicable</b>	<b>IOC Hrs / Dollars, if applicable</b>
Head office, administration office, other facilities (provide location(s))			
Work carried out by Inuit person(s) (provide list / names and details of work)			
Use of suppliers and services provided by Inuit firms (provide list of suppliers and detail of the services)			
<b>Total Accumulated IOC Dollars to date:</b>			

### PREPARED BY:

Name: \_\_\_\_\_

Telephone No: \_\_\_\_\_

Signature: \_\_\_\_\_

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

### Submit milestone report for each period to:

- 1) 1 copy with each Invoice
- 2) 1 copy to Project Authority: (to be named)
- 3) 1 copy to Contracting Authority: [marlene.hall@pwgsc-tpsgc.gc.ca](mailto:marlene.hall@pwgsc-tpsgc.gc.ca) or fax to: 204-983-7796

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**ANNEX "F" EVALUATION CRITERIA**

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**1. INSTRUCTIONS**

- 1.1 The Bidder must ensure that its Proposal provides sufficient evidence for the Evaluation Committee to assess the compliance of the Proposal with the criteria listed in this Request for Proposal (RFP). Bidders must make sure that their proposal clearly indicates the number of years/months experience (1 year = 12 months). It is the sole responsibility of the Bidder to provide sufficient information within its Proposal to enable the Evaluation Committee to complete its evaluation.
- 1.2 The Bidder must include any reference material it wishes to be considered for evaluation within its Proposal. Any material or documents outside the Proposal will not be considered (for example, should the Bidder wish to provide screen shots of its website or product, etc. for evaluation, copies or printouts of website or product material must be included within the Proposal). URL links to the Bidder's website will not be considered by the Evaluation Committee. No prior knowledge of or experience with the Bidder on the part of the Evaluation Committee will be taken into consideration by the Evaluation Committee.

**2. EVALUATION CRITERIA**

The Contractor must have a team that is comprised of experts in the various fields relevant to the scope of this requirement. Bidders may take the form of a group, for instance, a consortium, joint venture or partnership, to enable them to meet the requirements of this Contract.

**2.1 MANDATORY REQUIREMENTS**

- a. The Bidder's Proposal must meet all of the mandatory criteria in order for its Proposal to be considered for further evaluation. Failure on the part of the Bidder to meet any of these criteria will result in its Proposal being deemed non-compliant, with the Proposal being given no further consideration.
- b. Bidders must include the following table in their Technical Bid, indicating that it meets the mandatory criteria, and providing the bid page number or section that contains information to verify the criteria has been met.

ITEM	MANDATORY CRITERIA	CROSS REF PAGE #
<b>M1</b>	<b>Professional Team Identification</b>	
	<p>It is mandatory the Bidder demonstrates the qualifications of the following resources as described in Annex A.</p> <p>* A detailed listing of relevant academic and professional attainments of the proposed resource in relation to the requirements must be included.</p>	
<b>M1.1</b>	<p>The Bidder's Company/Joint Venture must be designated through an association such as Building Owners and Managers Association (BOMA) and/or International Facilities Management Association (IFMA).</p> <p>Association Name: _____</p> <p>Certification #: _____</p>	
<b>M1.2</b>	<p><b>Facility Management Professional (Consultant Team Leader)</b></p> <p>Must have a minimum of <u>three (3) years</u> experience as a Facility Management Professional. AND Must have one or more of the following:</p> <ul style="list-style-type: none"> <li>a. Certified Facility Manager (CFM) in good standing with International Facility Management Association (IFMA);</li> <li>b. Facilities Management Certificate (FMC) from the Building Owner Manager's Institute (BOMI); and/or</li> <li>c. Property Management Financial Proficiency Certificate (PMFJP) from BOMI</li> </ul> <p>Name: _____</p> <p>Association Name: _____</p> <p>Certification #: _____</p>	
<b>M1.3</b>	<p><b>Economist</b></p> <p>Must have a minimum of five (5) years experience in the quantification and evaluation of investment alternatives to support decision making, including development in support of analyzing alternatives of:</p> <ul style="list-style-type: none"> <li>a. Advantages and disadvantages with supporting justification</li> <li>b. Potential growth/economic impact overtime; and</li> <li>c. Assessment of feasibility</li> </ul> <p>AND</p>	



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WPG-5-38008

Buyer ID - Id de l'acheteur  
wpg016  
CCC No./N° CCC - FMS No./N° VME

	<p>Must have a Bachelors in Economics from an accredited or recognized university in North America.</p> <p>Name: _____</p> <p>University: _____</p> <p>Degree: _____</p> <p>Year: _____</p>	
<b>M1.4</b>	<p><b>Quantity Surveyor</b></p> <p>Professional Quantity Surveyor (PQS) designated within an affiliated Association in Canada.</p> <p>Name: _____</p> <p>Registration/Certification # _____</p> <p>Association Name: _____</p>	

## **2.2 POINT RATED CRITERIA**

- a. Bids meeting all mandatory criteria will be evaluated on the following point rated evaluation criteria.
- b. Bidders must obtain a minimum score of 70% for each criteria number R1, R2, R3 and R4 to be considered compliant. Bids which fail to attain at least 70% in each of these categories will be considered technically non-responsive and no further evaluation will be conducted.
- c. In addition, Bidders are encouraged to consider the Inuit Opportunities Considerations in category R5 when submitting their proposals. There is no pass mark for category R5.
- d. The maximum score for the Point Rated Criteria is 130 points.
- e. The maximum number of pages (including text and graphics) to be submitted for the Point Rated Criteria under this section is **thirty (30) pages**.

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

- i. Covering letter
- ii. Certification/Registration/ Designation/University degree/Post Graduate degree documents
- iii. Table of contents
- iv. Front page and required completion of Articles 1-6 of the RFP
- v. Front page of revision(s) to RFP
- vi. Price Proposal Form (Annex B)
- vii. Insurance Certificates (Annex C)
- viii. Inuit Opportunities Considerations (Annex D)

***Consequence of non-compliance: any pages which extend beyond the above limitation and any other attachments will be extracted from the proposal and will not be forwarded to the Evaluation Board members for evaluation.***

- f. The Point Rated Criteria will be evaluated using the outline below. Points will be rounded using standard mathematical methods to two (2) decimal places, when required.

Point Rated Criteria		Total Possible Points	Minimum Pass Mark
R1	Comparable Projects	30	21
R2	Core Project Team	40	28
R3	Supporting Project Team	25	17.5
R4	Team Asset Qualifications	5	3.5
R5	Inuit Opportunities Considerations	30	0 (no pass mark)
Total Possible Points		130 points	
Minimum Pass Mark		70 points	

**Bidders must clearly demonstrate in their bid how they meet the following Point-Rated Criteria:**

ITEM	POINT RATED CRITERIA	MAX. POINTS
R1	<b>Comparable Projects</b>	<b>30</b>
	<p>a. Through the description of up to three (3) recently completed (in the past seven years from RFP closing date) Facility Management projects and/or studies worked on by Bidder's Firm/Joint Venture. The comparable project typology should include, at a minimum:</p> <ol style="list-style-type: none"> <li>One example of the delivery of Facilities Management services to support ongoing operations by the Bidder;</li> <li>One example of the preparation of an investment analysis study of Facilities Management options to support long term delivery of facilities management decisions making by a client; and</li> </ol> <p>b. The Bidder must provide evidence that they have comparable experience to effectively provide services outlined in the SOW. Proposal must include project description and intent narrative, including demonstration of:</p> <ol style="list-style-type: none"> <li>How the project supports the Bidder in demonstrating that they are qualified to prepare an effective and accurate <i>Investment Analysis Report to select a Facilities Management Strategy for the Canadian High Arctic Research Station</i> in Cambridge Bay, Nunavut.</li> <li>Comparable constraints and challenges complete with approach to address constraints and challenges and resulting supporting resolutions to the project Constraints and Challenges. Assessment will consider innovation, development of appropriate and cost effective solutions that support providing demonstrate-able value to the project.</li> <li>Outline of Quality Management approach to ensure project is effective, comprehensive, considers the inter-related components within study and support decision making.</li> <li>Lessons learned and challenges in the application of Facilities Management services against the projected Facilities Management model in predicting the Facilities Management requirements.</li> </ol> <p>(as an example comparable Facilities Management projects could be located in the Arctic climate (above 55 degrees latitude) or for campuses of buildings that support multiple occupancies.)</p> <p>Bidders will be evaluated on the following points:</p> <ul style="list-style-type: none"> <li>Comparable project typology (max 5 pts)</li> <li>How the comparable project supports this project (max 10 pts)</li> <li>Comparable constraints and challenges (max 5 pts)</li> <li>Quality management approach (max 5 pts)</li> <li>Applicability of Lessons Learned to this project (max 5 pts)</li> </ul>	30

R2	Core Project Team	40
	<p>a. Demonstration of working as an interdisciplinary team environment should include a minimum of three (3) comparable Facilities Management Investment Analysis Report studies. The Core Project Team of the following specialists should be demonstrated:</p> <ol style="list-style-type: none"> <li>Consultant Team Leader: Facilities Management Professional;</li> <li>Facilities Management Modeling Specialist;</li> <li>Facilities Management Benchmarking Specialist;</li> <li>Facilities Management Investment Analyst;</li> <li>Facilities Management Risk Analyst.</li> </ol> <p>b. The assessment will consider, at a minimum, the following</p> <ol style="list-style-type: none"> <li>Identification of the Core Project Team members complete with explanation of: <ol style="list-style-type: none"> <li>Roles within the project team of comparable studies.</li> <li>Proposed role within this project.</li> <li>Demonstration of experience working together as a part of the same interdisciplinary project team.</li> </ol> </li> <li>Identification of how each comparable study is considered applicable to this study. Include for each comparable study consideration for: <ol style="list-style-type: none"> <li>Complexity of the Facilities Management model developed and how it is comparable to that of this project.</li> <li>Success in determining appropriate variables and modeling techniques for the facilities Management model in support the determination of reliable, long term, Facilities Management requirements/projections.</li> <li>Approach to customizing Benchmarking exercise to the project to ensure relevant, comparable data is used in the study.</li> <li>Applicability of Benchmarking exercise to identify and assess comparable facilities that was conducted in previous projects compared to that of this project.</li> </ol> </li> <li>Identification of challenges and constraints as the Project Team Lead/Facilities Management Lead complete with resolution to address identified challenges and constraints.</li> <li>Identification of project specific Facility management Risks and Mitigation strategies proposed within the study that could be relevant to this study.</li> </ol> <p>(as an example comparable Facilities Management projects could be located in the Arctic climate (above 55 degrees latitude) or for campuses of buildings that support multiple occupancies.)</p> <p>Bidders will be evaluated on the following points:</p> <ul style="list-style-type: none"> <li>Identification of Core Team experience and appropriateness of comparable study by Core Team (max 25 pts)</li> <li>Challenges and Constraints complete with resolutions (max 5 pts)</li> <li>Risks and Mitigations strategies from comparable study by Core Team (max 5 pts)</li> <li>Arctic climate or campuses that support multiple occupancy types (max 5 pts)</li> </ul>	40

R3	Supporting Project Team	25
	<p><b>1. Economist:</b></p> <p>Provide previous experiences (projects) that demonstrate experience in the quantification and evaluation of investment alternatives to support decision making, including development in support of analyzing alternatives of:</p> <ul style="list-style-type: none"> <li>• Advantages and disadvantages with supporting justification;</li> <li>• Potential growth and/or economic impact over time; and</li> <li>• Assessment of feasibility.</li> </ul>	5
	<p><b>2. Isolated Buildings Facilities Management Specialist:</b></p> <p>Should provide a minimum of two (2) years previous experience in providing Facilities Management services within isolated (immovable) buildings, in locations that can be accessed by road or water no more than six months of the year.</p> <ul style="list-style-type: none"> <li>(i) Identify the facility/facilities location, size and primary function; and</li> <li>(ii) Identify three (3) complications the team member experienced in the delivery of Facilities Management services to isolated locations and the methods used to mitigate complication(s) in the future.</li> </ul>	5
	<p><b>3. Laboratory Buildings Facilities Management Specialist:</b></p> <p>Should provide a minimum of three (3) years previous experience in providing Facilities Management services within Laboratory buildings that include, at a minimum, containment level 2 based upon Health Canada standards and guidelines.</p> <ul style="list-style-type: none"> <li>(i) Identify the facility/facilities location, size, primary function and identified containment level; and</li> <li>(ii) Identify three (3) complications the team member experienced in delivery of Facilities Management services in the laboratory buildings and the methods used to mitigate complication(s) in the future.</li> </ul>	5
	<p><b>4. Campus Facilities Management Specialist:</b></p> <p>Should provide a minimum of three (3) years previous experience in providing Facilities Management services within buildings that include a minimum of four (4) different Occupancy Classifications based upon the National Building Code of Canada.</p> <ul style="list-style-type: none"> <li>(i) Identify the campus building's Building Occupancies based upon the National Building Codes of Canada; and</li> <li>(ii) Identify three (3) complications in delivering Facilities Managements services within the campus buildings and the methods used to mitigate complication(s) in the future.</li> </ul>	5

	<b>5. Building Life Cycle Analyst:</b>  Demonstrate past experience, through 3 projects conducted over the last 10 years, in developing life cycle analysis to project the cost of facilities management ownership including the following for each facility/campus: <ul style="list-style-type: none"> <li>(i) Identify facility/facilities location, size, and function;</li> <li>(ii) Identify the projected life cycle of the analysis;</li> <li>(iii) Identify the scope of considerations within the analysis and how they are comparable to this project scope; and</li> <li>(iv) Comparison of the life cycle analysis to the first three years of implementation of facilities management for the said example.</li> </ul>	5
<b>R4</b>	<b>Team Asset Qualifications</b>  Points will be given for a project team that includes members who are in good standing with the following qualifications will be evaluated as follows (provide proof): <ul style="list-style-type: none"> <li>1. Risk Analyst: Canadian Risk Management (CRM) designation with experience in Facilities Management analysis. (1/2 point)</li> <li>2. Economist: Post Graduate degree in Economics from a recognized university in North America. (1/2 point)</li> <li>3. Investment Analyst: Graduate degree in business, business administration or commerce with a speciality in: (1 point)               <ul style="list-style-type: none"> <li>(a) Investment Analysis or Risk Analysis;</li> <li>(b) Facilities Management.</li> </ul> </li> <li>4. Professional Engineer able to practise in the Nunavut Territory and able to demonstrate experience in Laboratory buildings with a speciality in Mechanical Engineering. (1/2 point)</li> <li>5. Profession Engineer able to practise in the Nunavut Territory and able to demonstrate experience in Arctic buildings (above 55 degrees latitude) with a speciality in: (1 1/2 points)               <ul style="list-style-type: none"> <li>(a) Building Envelop Engineer; or</li> <li>(b) Mechanical Engineering; or</li> <li>(c) Electrical Engineering.</li> </ul> </li> <li>6. Professional Architect able to practise in the Nunavut Territory and able to demonstrate experience in the role of the "project architect", "lead architect", "project manager" or "architect of record: in: (1 point)               <ul style="list-style-type: none"> <li>(a) Laboratory buildings; or</li> <li>(b) Arctic building (above 55 degrees latitude) classified under Part 3 of the National Building Code of Canada.</li> </ul> </li> </ul>	5
<b>R5</b>	<b>Inuit Opportunities Considerations (No minimum pass mark)</b>	<b>30</b>
	1. The existence of head offices, administration offices or other facilities in the Nunavut Settlement Area  Points will be assigned based on the following: <ul style="list-style-type: none"> <li>a) Existence of head office(s) (max 2 pts)</li> <li>b) Administration office(s) (max 2 pts)</li> <li>c) Other facilities (max 2 pts)</li> </ul>	6

Solicitation No. - N° de l'invitation  
EW003-152413/A  
Client Ref. No. - N° de réf. du client  
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Amd. No. - N° de la modif.  
File No. - N° du dossier  
WPG-5-38008

Buyer ID - Id de l'acheteur  
wpg016  
CCC No./N° CCC - FMS No./N° VME

	<p>2. The employment of Inuit labour, engagement of Inuit professional services, or use of suppliers that are Inuit or Inuit firms in carrying out the contract.</p> <p>Points will be assigned based on the following:</p> <p>a) Details on the work to be carried out for each position proposed to be filled by an Inuit person.(max 15 pts)</p> <p>b) Strategies for recruitment of Inuit persons. (max 5 pts)</p> <p>c) Use of suppliers and identification of services to be provided by Inuit firms (max 4 pts)</p>	24
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