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## REQUEST FOR STANDING OFFER (RFSO)

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## **SUPPLEMENTARY INSTRUCTIONS TO PROPONENTS (SI)**

### **SI 1 Integrity Provisions – Associated Information**

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

### **SI 2 Federal Contractors Program for Employment Equity - Certification**

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

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

## **GENERAL INSTRUCTIONS TO PROPONENTS (GI)**

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## GENERAL INSTRUCTIONS TO PROPONENTS

### Integrity Provisions - Proposal

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

Indicia of control, include, but are not limited to, interlocking management or ownership, identity of interests among family members, shared facilities and equipment, common use of employees, or a business entity created following the acts or convictions specified in these Integrity Provisions which has the same or similar management, ownership, or principal employees, as the case may be.
4. Proponents who are incorporated, including those submitting proposals as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Proponent. Proponents submitting proposals as sole proprietorship, including those submitting proposals as a joint venture, must provide the name of the owner. Proponents submitting proposals as societies, firms, or partnerships do not need to provide lists of names.  
  
If the required names have not been received by the time the evaluation of proposals is completed, Canada will inform the Proponent of a time frame within which to provide the information. Failure to provide the names within the time frame specified will render the proposal non-responsive. Providing the required names is a mandatory requirement for a Standing Offer to be issued.  
  
Canada may, at any time, request that the Proponent provide properly completed and signed consent forms (Consent to a Criminal Record Verification form - PWGSC-TPSGC 229) for any or all individuals mentioned above within a specified time frame. Failure to provide such consent forms and associated information within the time frame provided, or failure to cooperate to the verification process will result in the proposal being declared non-responsive.
5. The Proponent must diligently inform Canada in writing of any changes affecting the list of names of directors during this procurement process as well as during the period of any Standing Offer

arising from this RFSO and any resulting call-ups. The Proponent must also, when requested, provide Canada with properly completed and signed consent forms.

6. By submitting a proposal, the Proponent certifies that it is aware, and that its affiliates are aware, that Canada may request additional information, certifications, consent forms and other evidentiary elements proving identity or eligibility. Canada may also verify the information provided by the Proponent, including the information relating to the acts or convictions specified in these Integrity Provisions, through independent research, use of any government resources or by contacting third parties.
7. By submitting a proposal, the Proponent certifies that neither the Proponent nor any of the Proponent's Affiliates have directly or indirectly, paid or agreed to pay, and will not, directly or indirectly, pay a contingency fee to any individual for the solicitation, negotiation or obtaining of the Standing Offer and any resulting call-ups if the payment of the fee would require the individual to file a return under section 5 of the Lobbying Act.
8. Time Period

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

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

9. By submitting a proposal, the Proponent certifies that neither the Proponent nor any of the Proponent's Affiliates have been convicted of an offence or received a conditional or an absolute discharge under any of the following provisions, unless the time period, as defined in the Time Period subsection, has elapsed:
  - a. paragraph 80(1)(d) (*False entry, certificate or return*), subsection 80(2) (*Fraud against Her Majesty*) or section 154.01 (*Fraud against Her Majesty*) of the *Financial Administration Act*, or
  - b. section 121 (*Frauds on the government and Contractor subscribing to election fund*), section 124 (*Selling or Purchasing Office*), section 380 (*Fraud*) for fraud committed against Her Majesty or section 418 (*Selling defective stores to Her Majesty*) of the *Criminal Code*, or
  - c. section 119 (*Bribery of judicial officers, etc.*), section 120 (*Bribery of officers*), section 346 (*Extortion*), sections 366 to 368 (*Forgery and other offences resembling forgery*), section 382 (*Fraudulent manipulation of stock exchange transactions*), section 382.1 (*Prohibited insider trading*), section 397 (*Falsification of books and documents*), section 422 (*Criminal breach of contract*), section 426 (*Secret commissions*), section 462.31 (*Laundering proceeds of crime*) or sections 467.11 to 467.13 (*Participation in activities of criminal organization*) of the *Criminal Code*, or
  - d. section 45 (*Conspiracies, agreements or arrangements between competitors*), section 46 (*Foreign directives*), section 47 (*Bid rigging*), section 49 (*Agreements or arrangements of federal financial institutions*), section 52 (*False or misleading representation*), section 53 (*Deceptive notice of winning a prize*) of the *Competition Act*, or
  - e. section 239 (*False or deceptive statements*) of the *Income Tax Act*, or

- f. section 327 (*False or deceptive statements*) of the *Excise Tax Act*, or
- g. section 3 (*Bribing a foreign public official*), section 4 (*Accounting*), or section 5 (*Offence committed outside Canada*) of the *Corruption of Foreign Public Officials Act*, or
- h. section 5 (*Trafficking in substance*), section 6 (*Importing and exporting*), or section 7 (*Production of substance*) of the *Controlled Drugs and Substance Act*.

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

10. Foreign Offences

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

11. Sub-consultants

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

12. Preventive Measures associated with the Time Period

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

13. Public Interest Exception

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

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

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

14. Non-application



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

## **GI 1 INTRODUCTION**

1. Parks Canada Agency (PCA) is inviting consulting firms with Architecture and prime consultant services expertise to submit proposals for Standing Offers. The selected consultants shall provide a range of services as identified in the Required Services section of this document
2. Proponents shall be licensed to practise in the province indicated in the Required Services (RS 1.). Firms should be able to demonstrate successful delivery of these services for a broad variety of projects over the last **five (5) years**. In general, the firm and its personnel will be evaluated on the basis of their demonstrated understanding of the scope of services, their approach and methodology to providing those services, the quality of their relevant experience in this area, as well as the cost of the provision of the services.
3. It is Parks Canada's intention to authorize up to **five (5)** Standing Offers, each for a period of two (2) years with an option to extend the Standing Offer for three (3) additional years from the date of issuing the Standing Offers. The total dollar value of all Standing Offers is estimated to be **\$20,000,000.00 (Applicable Taxes included)**. Individual call-ups will vary, up to a maximum of **\$2,500,000.00 (Applicable Taxes included)**. Proponents should note that there is no guarantee that the full or any amount of the Standing Offers will be called-up; PCA will issue call-ups only when the specific services to be provided under the Standing Offer are needed. Please refer to Section SP5, CALL-UP PROCEDURE.
4. This procurement is subject to the provisions of the North American Free Trade Agreement (NAFTA), the World Trade Organization - Agreement on Government Procurement (WTOAGP), the Canada-Colombia Free Trade Agreement, the Canada-Peru Free Trade Agreement and the Canada-Chile Free Trade Agreement.
5. All reference to the Minister of Public Works and Government Services Canada shall be deleted and replaced with the Minister of the Environment for the purposes of the Parks Canada Agency. All reference to the Department of Public Works and Government Services Canada shall be deleted and replaced with the Parks Canada Agency.

## **GI 2 PROCUREMENT BUSINESS NUMBER**

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

## **GI 3 CONTRACTING AUTHORITY**

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

**Sheldon Lalonde**  
Contracting Officer, National Contracting Services  
Parks Canada Agency  
111 Water Street East  
Cornwall, Ontario K6H 6S3  
Tel: 613-938-5948  
Fax: 866-246-6893

Email: **Sheldon.Lalonde@pc.gc.ca**

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

#### **GI 4 DEPARTMENTAL REPRESENTATIVE**

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

#### **GI 5 QUANTITY**

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

#### **GI 6 PCA OBLIGATION**

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

#### **GI 7 RESPONSIVE PROPOSALS**

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

#### **GI 8 COMMUNICATIONS - SOLICITATION PERIOD**

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

#### **GI 9 OVERVIEW OF SELECTION PROCESS**

1. The Standing Offer selection process is as follows:
  - a) A Request for Standing Offer is obtained by proponents through the GETS;

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

## **GI 10 SUBMISSION OF PROPOSAL**

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

6. The proposal should completely and thoroughly address each element of the requirements as enumerated in the Request for Standing Offer. It is also essential that the elements contained in the proposal be stated in a clear and concise manner.
7. Proposal documents and supporting information may be submitted in either English or French.
8. Canada will make available Notices of Proposed Procurement (NPP), RFSOs and related documents for download through the Government Electronic Tendering Service (GETS). Canada is not responsible and will not assume any liabilities whatsoever for the information found on websites of third parties. In the event an NPP, RFSO or related documentation would be amended, Canada will not be sending notifications. Canada will post all amendments using GETS. It is the sole responsibility of the Proponent to regularly consult GETS for the most up-to-date information. Canada will not be liable for any oversight on the Proponent's part nor for notification services offered by a third party.
9. Offers will remain open for acceptance for a period of not less than **90 days** from the closing date of the RFSO, unless specified otherwise in the RFSO. Canada reserves the right to seek an extension of the offer validity period from all responsive offerors in writing, within a minimum of 3 days before the end of the offer validity period. If the extension is accepted by all responsive offerors, Canada will continue with the evaluation of the offers. If the extension is not accepted by all responsive offerors, Canada will, at its sole discretion, either continue with the evaluation of the offers of those who have accepted the extension or cancel the RFSO.

#### **GI 11 NON-ACCEPTANCE OF ELECTRONICALLY TRANSMITTED PROPOSALS**

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

#### **GI 12 EVALUATION OF PRICE**

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

#### **GI 13 LIMITATION OF SUBMISSIONS**

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

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

#### **GI 14 LICENSING REQUIREMENTS**

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

#### **GI 15 REJECTION OF PROPOSAL**

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

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

#### **GI 16 NOT APPLICABLE**

#### **GI 17 INSURANCE REQUIREMENTS**

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

#### **GI 18 JOINT VENTURE**

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

#### **GI 19 LATE SUBMISSIONS**

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

#### **GI 20 DEFINITION OF PROPONENT AND LEGAL CAPACITY**

"Proponent" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a proposal to provide services under a call-up resulting from a standing offer. It does not include the parent, subsidiaries or other affiliates of the Proponent, or its sub-consultants. The Proponent must have the legal capacity to contract. If the Proponent is a sole proprietorship, a partnership or a corporate body, the Proponent must provide, if requested by the Contracting Authority, a statement and



any requested supporting documentation indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business. This also applies to proponents submitting a proposal as a joint venture.

## **GI 21 DEBRIEFING**

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

## **GI 22 FINANCIAL CAPABILITY**

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

3. If the Proponent is a subsidiary of another company, then any financial information in 1. (a) to (e) above required by the Contracting Authority must be provided by the ultimate parent company. Provision of parent company financial information does not by itself satisfy the requirement for the provision of the financial information of the Proponent, and the financial capability of a parent cannot be substituted for the financial capability of the Proponent itself unless an agreement by the parent company to sign a Parental Guarantee, as drawn up by Parks Canada (PCA), is provided with the required information.
4. Other Information: Canada reserves the right to request from the Proponent any other information that Canada requires to conduct a complete financial capability assessment of the Proponent.
5. Confidentiality: If the Proponent provides the information required above to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as permitted by the Access to Information Act, R.S., 1985, c. A-1, Section 20(1) (b) and (c).
6. Security: In determining the Proponent's financial capability to fulfill this requirement, Canada may consider any security the Proponent is capable of providing, at the Proponent's sole expense (for example, an irrevocable letter of credit from a registered financial institution drawn in favour of Canada, a performance guarantee from a third party or some other form of security, as determined by Canada).
7. In the event that a proposal is found to be non-compliant on the basis that the Proponent is considered NOT to be financially capable of performing the subject requirement, official notification shall be provided to the Proponent.

#### **GI 23 REVISION OF PROPOSAL**

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

#### **GI 24 PERFORMANCE EVALUATION**

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

#### **GI 25 PROPOSAL COSTS**

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

#### **GI 26 CONFLICT OF INTEREST - UNFAIR ADVANTAGE**

1. In order to protect the integrity of the procurement process, proponents are advised that Canada may reject a proposal in the following circumstances:



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

#### **GI 27 LIMITATION OF LIABILITY**

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

#### **GI 28 STATUS AND AVAILABILITY OF RESOURCES**

The Proponent certifies that, should it be issued a standing offer as a result of the Request for Standing Offer, every individual proposed in its proposal will be available to perform the Services resulting from a call-up against the Standing Offer as required by Canada's representatives and at the time specified in a call-up or agreed to with Canada's representatives. If the Proponent is unable to provide the services of an individual named in its proposal, the Proponent may propose a substitute with at least the same qualifications and experience. The Proponent must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement for Canada's approval in its sole discretion.

## **STANDING OFFER PARTICULARS (SP)**

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

## STANDING OFFER PARTICULARS

### SP 1 GENERAL

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

### SP 2 WITHDRAWAL/REVISION

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

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

### SP 3 PERIOD OF THE STANDING OFFER

The period for placing call-ups against the Standing Offer shall be for two (2) years commencing from the start date identified on the Standing Offer.

If the Standing Offer is authorized for use beyond the initial period, the Consultant offers to extend its proposal for an additional three (3), one year periods under the same conditions and at the rates or prices specified in the Standing Offer.

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

### SP 4 CALL-UP LIMITATION

Each call-up against the Standing Offer will have a maximum limitation of expenditure of **\$400,000.00 (including all fees, taxes and amendments)**.

**For all projects funded under the Federal Infrastructure Program** of work the maximum call-up limitation will be in accordance with the Parks Canada approved special authorities, and will have a maximum call-up limitation of **\$2,500,000.00 (including all applicable fees, taxes and amendments)**.

## **SP 5 CALL-UP PROCEDURE**

1. Services will be called-up as follows:

- a) The Departmental Representative will establish the scope of services to be performed. For each individual Call-Up, consultants will be considered using a computerized distribution system. This system will track all call-ups assigned to each consultant and will maintain a running total of the dollar value of business distributed. The system will contain for each consultant an ideal business distribution percentage which has been established as follows: 40% of the business for the top ranked consultant, 25% for the 2nd ranked consultant, 20% for the 3rd ranked consultant, 10% for the 4th ranked consultant and 5% for the 5th ranked consultant. In the event fewer than five (5) consultants are successful, the undistributed % of business will be redistributed amongst the offerors being recommended using the following formula:

b)

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

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

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

2. The Consultant will be authorized in writing by the Contracting Authority to proceed with the services by issuance of a Call-up against the Standing Offer.
3. Any proposed changes to the scope of work are to be discussed with the Departmental Representative but any resulting changes can only be authorized by an amendment issued by the Contracting Authority.

**SP 6 INVOICING**

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

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

## TERMS AND CONDITIONS

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

**0220DA            GENERAL CONDITIONS**

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

## GC 1 Definitions

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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



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

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

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

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

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

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

## **GC 2 Interpretations**

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

## **GC 3 Not Applicable**

## **GC 4 Assignment**

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

## **GC 5 Indemnification**

1. The *Consultant* shall indemnify and save harmless *Canada*, its employees and agents, from losses arising out of the errors, omissions or negligent acts of the *Consultant*, its employees and agents, in the performance of the *Services* under the Call-up that may result from the Standing Offer.
2. The *Consultant's* liability to indemnify or reimburse *Canada* under the Standing Offer shall not affect or prejudice *Canada* from exercising any other rights under law.

## **GC 6 Notices**

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

#### **GC 7 Suspension**

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

#### **GC 8 Termination**

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

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

1. Canada may take all or any part of the *Services* out of the *Consultant's* hands and may employ reasonable means necessary to complete such *Services* in the event that:
  - (a) The *Consultant* has become insolvent or has committed an act of bankruptcy, and has neither made a proposal to the *Consultant's* creditors nor filed a notice of intention to make such a proposal, pursuant to the *Bankruptcy and Insolvency Act*, or

- (b) the *Consultant* fails to perform any of the *Consultant's* obligations under the Standing Offer or any of the Call-ups or, in Canada's opinion, so fails to make progress as to endanger performance of the Standing Offer or any of its call-ups, in accordance with its terms.
2. If the *Consultant* has become insolvent or has committed an act of bankruptcy, and has either made a proposal to the *Consultant's* creditors or filed a notice of intention to make such a proposal, pursuant to the *Bankruptcy and Insolvency Act*, the *Consultant* shall immediately forward a copy of the proposal or the notice of intention to the *Contracting Authority*.
  3. Before the *Services* or any part thereof are taken out of the *Consultant's* hands under GC 9.1(b), the *Departmental Representative* will provide notice to the *Consultant*, and may require such failure of performance or progress to be corrected. If within fourteen (14) days after receipt of notice the default is not corrected or corrective action is not initiated to correct such fault, Canada may, by notice, without limiting any other right or remedy, take all or any part of the *Services* out of the *Consultant's* hands.
  4. If the *Services* or any part thereof have been taken out of the *Consultant's* hands, the *Consultant* will be liable for, and upon demand pay to *Canada*, an amount equal to all loss and damage suffered by *Canada* by reason of the non-completion of the *Services* by the *Consultant*.
  5. If the *Consultant* fails to pay on demand for the loss or damage as a result of GC 9.4, *Canada* will be entitled to deduct and withhold the same from any payments due and payable to the *Consultant*.
  6. If the *Services* or any part thereof are taken out of the *Consultant's* hands as a result of GC 9.1(b) and GC 9.3, the amount referred to in GC 9.5 shall remain in the Consolidated Revenue Fund until an agreement is reached or a decision of a court or tribunal is rendered. At that time the amount, or any part of it, which may become payable to the *Consultant* shall be paid together with interest from the due date referred to in TP 2 of clause 9998DA, Terms of Payment, and in accordance with the terms of the Standing Offer.
  7. The taking of the *Services*, or any part thereof, out of the *Consultant's* hands does not relieve or discharge the *Consultant* from any obligation under the Standing Offer, the Call-up, or imposed upon the *Consultant* by law, in respect to the *Services* or any part thereof that the *Consultant* has performed.

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

1. Time charged and the accuracy of the *Consultant's* time recording system may be verified by the *Departmental Representative* before or after payment is made to the *Consultant* under the terms and conditions of the Call up.
2. The *Consultant* shall keep accurate time and cost records and, if required for the purposes of the Standing Offer, shall make these documents available to the *Departmental Representative* who may make copies and take extracts therefrom.
3. The *Consultant* shall afford facilities for audit and inspection upon request and shall provide the *Departmental Representative* with such information as may be required from time to time with reference to the documents referred to in GC 10.2.
4. The *Consultant* shall, unless otherwise specified, keep the time sheets and cost records available for audit and inspection for a period of at least six (6) years following completion of the *Services*.
5. If the verification is done after payment by Canada, the *Consultant* agrees to repay any overpayment immediately upon demand.

## **GC 11 National or Departmental Security**

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

## **GC 12 Rights to Intellectual Property**

### 1. Definitions

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

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

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

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

"Technical Output" means: (i) all information of a scientific, technical, or artistic nature relating to the *Services*, whether oral or recorded in any form or medium and whether or not subject to copyright, including but not limited to any Inventions, designs, methods, reports, photographs, physical models, surveys, drawings, specifications developed for the purpose of the Project; as well as (ii) computer printouts, design notes, calculations, CADD (Computer-aided Design and Drafting) files, and other data, information and material, prepared, computed, drawn, or produced for the purpose of the Project; and (iii) operating and maintenance manuals prepared or collected for the Project; and (iv) any buildings, built works, structures and facilities constructed as, or as part of, the Project. Technical Output does not include data concerned with the administration of the Standing Offer and/or Call-Up by Canada or the *Consultant*, such as internal financial or management information, unless it is a deliverable under the terms of the Standing Offer and/or Call-Up.

### 2. Identification and Disclosure of Foreground

The *Consultant* shall:

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

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

### 3. IP Rights Vest with *Consultant*

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

### 4. Ownership Rights in Deliverables

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

### 5. Licence to Foreground

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

- (a) the construction or implementation of any building, built works, structures and facilities, contemplated by the Project;
- (b) the further development or alteration or evolution of any part of the constructed or implemented Project, including procurement of materials and components for this purpose;
- (c) the further development, modification (including additions or deletions), completion, translation, or implementation of the Foreground and any addition to it as *Canada* may require for the purposes of the completion, utilization and subsequent evolution of the Project;
- (d) the use, occupancy, operation, exploitation, maintenance, repair or restoration of the constructed or implemented or subsequently modified Project, including the procurement of replacement materials and components required for any such purpose; and
- (e) the publishing and transmission of reproductions of the Project or any part thereof in the form of paintings, drawings, engravings, photographs or cinematographic works, to the

public, in hard copy or by any electronic or other means, except for copies in the nature of architectural drawings or plans.

6. Licence to Foreground for Other Projects

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

7. Licence to Background

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

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

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

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

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

9. *Consultant's* Right to Grant Licence

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



10. Trade Secrets and Confidential Information

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

11. *Canada* Supplied Information

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

12. Transfer of IP Rights

- (a) If *Canada* takes the *Services* out of the *Consultant's* hands in accordance with GC 9 of the General Conditions, in whole or in part, or if the *Consultant* fails to disclose any Foreground in accordance with article GC 12.2, *Canada* may upon reasonable notice, require the *Consultant* to convey to *Canada* all of the IP Rights in the Foreground or in the case of a failure to disclose, all the IP Rights in the Foreground not provided. The IP Rights to be conveyed shall include the IP Rights in any Foreground that have vested or are to vest in a *Sub-Consultant*. In the case of IP Rights in Foreground which have been sold or assigned to a party other than a *Sub-Consultant*, the *Consultant* shall not be obligated to convey those IP Rights to *Canada*, but shall pay to *Canada* on demand an amount equal to the consideration which the *Consultant* received from the sale or assignment of the IP Rights in that Foreground or, in the case of a sale or assignment was not at arm's length, the fair market value of the IP Rights in that Foreground, in each case including the value of future royalties or licence fees.
- (b) In the event of the issuance by *Canada* of a notice referred to in (a), the *Consultant* shall, at the *Consultant's* own expense and without delay, execute such conveyances or other documents relating to title to the IP Rights as *Canada* may require, and the *Consultant* shall, at *Canada's* expense, afford *Canada* all reasonable assistance in the preparation of applications and in the prosecution of any applications for, or any registration of, any IP Right in any jurisdiction, including without limitation the assistance of the inventor in the case of Inventions.
- (c) Until the *Consultant* completes the performance of the *Services* and discloses all of the Foreground in accordance with article GC 12.2, and subject to the provisions of GC 11 National or Departmental Security, the *Consultant* shall not, without the prior written

permission of Canada, sell, assign or otherwise transfer title to the IP Rights in any of the Foreground, or license or otherwise authorize the use of the IP Rights in any of the Foreground by any person.

- (d) In any sale, assignment, transfer or licence of IP Rights in Foreground by the *Consultant* except a sale or licence for end use of a product based on Foreground, the *Consultant* shall impose on the other party all of its obligations to *Canada* in relation to the IP Rights in the Foreground and any restrictions set out in the Standing Offer and/or Call-Up on the use or disposition of the IP Rights in the Foreground (and, if applicable, the Foreground itself), including the obligation to impose the same obligations and restrictions on any subsequent transferee, assignee or licensee. The *Consultant* shall promptly notify *Canada* of the name, address and other pertinent information in regard to any transferee, assignee or licensee.

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

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

### **GC 14 Status of Consultant**

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



## **GC 15 Declaration by Consultant**

The *Consultant* declares that:

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

## **GC 16 Insurance Requirements**

### **1. General**

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

### **2. Commercial General Liability**

- a) The insurance coverage provided shall not be less than that provided by IBC Form 2100, as amended from time to time, and shall have: a limit of liability of not less than \$5,000,000.00 per occurrence; an aggregate limit of not less than \$5,000,000.00 within any policy year.
- b) The policy shall insure the Consultant and shall include Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services as an Additional Insured, with respect to liability arising out of the performance of the *Services*.

### **3. Professional Liability**

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

## **GC 17 Resolution of Disagreements**

1. In the event of a disagreement regarding any aspect of the *Services* or any instructions given under the Standing Offer and subsequent Call-ups:
  - (a) The *Consultant* may give a notice of disagreement to the *Departmental Representative*. Such notice shall be promptly given and contain the particulars of the disagreement, any changes in time or amounts claimed, and reference to the relevant clauses of the Standing Offer and Call-up;
  - (b) The *Consultant* shall continue to perform the *Services* in accordance with the instructions of the *Departmental Representative*; and
  - (c) The *Consultant* and the *Departmental Representative* shall attempt to resolve the disagreement by negotiations conducted in good faith. The negotiations shall be conducted, first, at the level of the *Consultant's* project representative and the *Departmental Representative* and, secondly and if necessary, at the level of a principal of the *Consultant* firm and a senior departmental manager.
2. The *Consultant's* continued performance of the *Services* in accordance with the instructions of the *Departmental Representative* shall not jeopardize the legal position of the *Consultant* in any disagreement.
3. If it was subsequently agreed or determined that the instructions given were in error or contrary to the Standing Offer or Call-up, *Canada* shall pay the *Consultant* those fees the *Consultant* shall have earned as a result of the change(s) in the *Services* provided, together with those reasonable disbursements arising from the change(s) and which have been authorized by the *Departmental Representative*.
4. The fees mentioned in GC 17.3 shall be calculated in accordance with the Terms of Payment set out in the Standing Offer and the relevant Call-up.
5. If the disagreement is not settled, the *Consultant* may make a request to the *Departmental Representative* for a written departmental decision and the *Departmental Representative* shall give notice of the departmental decision within fourteen (14) days of receiving the request, setting out the particulars of the response and any relevant clauses of the Standing Offer or Call-up.
6. Within fourteen (14) days of receipt of the written departmental decision, the *Consultant* shall notify the *Departmental Representative* if the *Consultant* accepts or rejects the decision.
7. If the *Consultant* rejects the departmental decision, the *Consultant*, by notice may refer the disagreement to *Mediation*.
8. If the disagreement is referred to *Mediation*, the *Mediation* shall be conducted with the assistance of a skilled and experienced mediator chosen by the *Consultant* from a list of mediators proposed by *Canada*, and departmental *Mediation* procedures shall be used unless the parties agree otherwise.
9. Negotiations conducted under the Standing Offer and any resulting Call-up, including those conducted during *Mediation*, shall be without prejudice.

#### **GC 18 Amendments**

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

#### **GC 19 Entire Agreement**

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

## **GC 20 Contingency Fees**

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

## **GC 21 Harassment in the Workplace**

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

## **GC 22 Taxes**

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

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

### **GC 23 Changes in the *Consultant* team**

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

### **GC 24 Joint and Several Liability**

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

### **GC 25 Not Applicable**

### **GC 26 International Sanctions**

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

## **GC 27 Integrity Provisions - Standing Offer and Contract**

1. The Consultant agrees to comply with the Code of Conduct for Procurement (<http://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/contexte-context-eng.html>) and to be bound by its terms. In addition, the Consultant must also comply with the terms set out in this section.
2. The Consultant confirms that it understands that, to ensure fairness, openness and transparency in the procurement process, the commission of certain acts or offences may result in setting aside the Standing Offer and terminating for default any resulting contracts. If the Consultant made a false declaration in its proposal, makes a false declaration under the contract, fails to diligently maintain up-to-date the information requested, or if the Consultant or any of the Consultant's Affiliates fail to remain free and clear of any acts or convictions specified in these Integrity Provisions during the period of the Standing Offer, such false declaration or failure to comply may result, following a notice period, in the setting aside of the Standing Offer and the termination for default of any resulting contracts. The Consultant understands that a termination for default will not restrict Canada's right to exercise any other remedies that may be available against the Consultant and agrees to immediately return any advance payments.
3. **Affiliates**  
For the purpose of these Integrity Provisions, everyone, including but not limited to organizations, bodies corporate, societies, companies, firms, partnerships, associations of persons, parent companies and subsidiaries, whether partly or wholly-owned, as well as individuals and directors, are Consultant's Affiliates if:
  - a. directly or indirectly either one controls or has the power to control the other, or
  - b. a third party has the power to control both.

Indicia of control, include, but are not limited to, interlocking management or ownership, identity of interests among family members, shared facilities and equipment, common use of employees, or a business entity created following the acts or convictions specified in these Integrity Provisions which has the same or similar management, ownership, or principal employees, as the case may be.
4. The Consultant who is incorporated or who is a sole proprietorship has already provided a list of names of all individuals who are directors of the Consultant or the name of the owner. The Consultant who has submitted a proposal as a joint venture has already provided a list of names of all directors, or the name of the owner, for each member of the joint venture. The Consultant must diligently inform Canada in writing of any changes affecting the list of names of directors during the period of the Standing Offer and the period of any resulting contracts. The Consultant must also, when requested, provide Canada with properly completed and signed consent forms and associated information, and cooperate to the verification process.

5. The Consultant certifies that it is aware, and that its Affiliates are aware, that Canada may verify the information provided by the Consultant, including the information relating to the acts or convictions specified in these Integrity Provisions through independent research, use of any government resources or by contacting third parties.
6. The Consultant certifies that neither the Consultant nor any of the Consultant's Affiliates have directly or indirectly, paid or agreed to pay, and will not, directly or indirectly, pay a contingency fee to any individual for the solicitation, negotiation or obtaining of the Standing Offer and any call-ups made against the Standing Offer if the payment of the fee would require the individual to file a return under section 5 of the Lobbying Act.

7. Time Period

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

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

8. The Consultant certifies that neither the Consultant nor any of the Consultant's Affiliates have been convicted of an offence or received a conditional or an absolute discharge under any of the following provisions, unless the time period, as defined in the Time Period subsection, has elapsed:
  - a. paragraph 80(1)(d) (*False entry, certificate or return*), subsection 80(2) (*Fraud against Her Majesty*) or section 154.01 (*Fraud against Her Majesty*) of the *Financial Administration Act*, or
  - b. section 121 (*Frauds on the government and Contractor subscribing to election fund*), section 124 (*Selling or Purchasing Office*), section 380 (*Fraud*) for fraud committed against Her Majesty or section 418 (*Selling defective stores to Her Majesty*) of the *Criminal Code*, or
  - c. section 119 (*Bribery of judicial officers, etc*), section 120 (*Bribery of officers*), section 346 (*Extortion*), sections 366 to 368 (*Forgery and other offences resembling forgery*), section 382 (*Fraudulent manipulation of stock exchange transactions*), section 382.1 (*Prohibited insider trading*), section 397 (*Falsification of books and documents*), section 422 (*Criminal breach of contract*), section 426 (*Secret commissions*), section 462.31 (*Laundering proceeds of crime*) or sections 467.11 to 467.13 (*Participation in activities of criminal organization*) of the *Criminal Code*, or
  - d. section 45 (*Conspiracies, agreements or arrangements between competitors*), section 46 (*Foreign directives*), section 47 (*Bid rigging*), section 49 (*Agreements or arrangements of federal financial institutions*), section 52 (*False or misleading representation*), section 53 (*Deceptive notice of winning a prize*) of the *Competition Act*, or
  - e. section 239 (*False or deceptive statements*) of the *Income Tax Act*, or
  - f. section 327 (*False or deceptive statements*) of the *Excise Tax Act*, or
  - g. section 3 (*Bribing a foreign public official*), section 4 (*Accounting*), or section 5 (*Offence committed outside Canada*) of the *Corruption of Foreign Public Officials Act*, or
  - h. section 5 (*Trafficking in substance*), section 6 (*Importing and exporting*), or section 7 (*Production of substance*) of the *Controlled Drugs and Substance Act*.



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

9. Foreign Offences

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

10. Sub-consultants

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

11. Non-application

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

## **0000DA SUPPLEMENTARY CONDITIONS**

### **SC 1 Canada to Own Intellectual Property Rights in Foreground Information**

#### **4007 01 (2008-05-12) Interpretation**

1. In the Contract, unless the context otherwise requires:

##### "Background Information"

- means all Intellectual Property that is not Foreground Information that is incorporated into the Work or necessary for the performance of the Work, regardless of whether it is owned by the Contractor or a third party;

##### "Firmware"

- means computer programs that are stored in integrated circuits, read-only memory or other similar devices within the hardware or other equipment;

##### "Foreground Information"

- means all Intellectual Property first conceived, developed, produced or reduced to practice as part of the Work under the Contract;

##### "General Conditions"

- means the general conditions that form part of the Contract;

##### "Intellectual Property"

- means any information or knowledge of an industrial, scientific, technical, commercial, literary, dramatic, artistic or otherwise creative nature relating to the Work, whether oral or recorded in any form or medium and whether or not subject to copyright; this includes but is not limited to any inventions, designs, methods, processes, techniques, know-how, show-how, models, prototypes, patterns, samples, schematics, experimental or test data, reports, drawings, plans, specifications, photographs, manuals and any other documents, Software, and Firmware;

##### "Intellectual Property Right"

- means any intellectual property right recognized by law, including any intellectual property right protected by legislation such as patents, copyright, industrial design, integrated circuit topography, and plant breeders' rights, or subject to protection under the law as trade secrets and confidential information.

##### "Software"

- means any computer program whether in source or object code (including Firmware), any computer program documentation recorded in any form or upon any medium, and any computer database, including any modification.

2. Words and expressions defined in the General Conditions and used in these supplemental general conditions have the meanings given to them in the General Conditions. In the event of any inconsistency between the General Conditions and these supplemental general conditions, the applicable provisions of these supplemental general conditions will prevail.
3. If supplemental general conditions 4001 and 4003 are also incorporated in the Contract, the provisions of those supplemental general conditions concerning the ownership of Intellectual Property will prevail in relation to the subject matter of those supplemental general conditions.

#### **4007 02 (2008-05-12) Record and Disclosure of Foreground Information**

1. During and after the performance of the Contract, the Contractor must keep detailed records of the Foreground Information, including details of its creation. The Contractor must report and fully disclose to Canada all Foreground Information as required by the Contract. If the Contract does



not specifically state when and how the Contractor must do so, the Contractor must provide this information if requested by the Contracting Authority, whether before or after the completion of the Contract.

2. Before and after final payment to the Contractor, the Contractor must provide Canada with access to all records and supporting data that Canada considers pertinent to the identification of Foreground Information.
3. For any Intellectual Property that was developed or created in relation to the Work, Canada will be entitled to assume that it was developed or created by Canada, if the Contractor's records do not list that Intellectual Property or do not indicate that it was created by the Contractor, or by someone on behalf of the Contractor, other than Canada.

#### **4007 03 (2008-05-12) Ownership of Intellectual Property Rights in Foreground Information**

1. All Intellectual Property Rights in the Foreground Information belong to Canada as soon as they come into existence. The Contractor has no right in or to any such Intellectual Property Rights in the Foreground Information, except any right that may be granted in writing by Canada.
2. The Contractor must incorporate the copyright symbol and one of the following notices, as appropriate into all Foreground Information that is subject to copyright regardless of the form or medium upon which it is recorded: © Her Majesty the Queen in Right of Canada (year), or © Sa Majesté la Reine du chef du Canada (année).
3. The Contractor must execute any documents relating to the Intellectual Property Rights in the Foreground Information as Canada may require. The Contractor must, at Canada's expense, provide Canada all reasonable assistance in the preparation of applications and in the prosecution of any applications for registration of any Intellectual Property Rights in any jurisdiction, including the assistance of the inventor in the case on inventions.

#### **4007 04 (2008-05-12) License to Intellectual Property Rights in Background Information**

1. The Contractor grants to Canada a license to use the Background Information to the extent that it is reasonably necessary for Canada to exercise fully all its rights in the deliverables and in the Foreground Information. This license is non-exclusive, perpetual, irrevocable, worldwide, fully-paid and royalty-free. The license cannot be restricted in any way by the Contractor providing any form of notice to the contrary, including the wording on any shrink-wrapped license attached to any deliverable.
2. For greater certainty, Canada's license in the Background Information includes, but is not limited to:
  - a. the right to disclose the Background Information to third parties bidding on or negotiating contracts with Canada and to sublicense or otherwise authorize the use of that information by any contractor engaged by Canada solely for the purpose of carrying out such contracts. Canada will require these third parties and contractors not to use or disclose that information except as may be necessary to bid, negotiate or carry out those contracts;
  - b. the right to disclose the Background Information to other governments for information purposes;
  - c. the right reproduce, modify, improve, develop or translate the Background Information or have it done by a person hired by Canada. Canada, or a person designated by Canada, will own the Intellectual Property Rights associated with reproduction, modification, improvement, development or translation.
  - d. without restricting the scope of any license or other right in the Background Information that Canada may otherwise hold in relation to any custom-designed or custom-manufactured part of the Work, the right to use and disclose to a contractor engaged by Canada the Background Information for the following purposes:
    - i. For the use, operation, maintenance, repair or overhaul of the custom-designed or custom-manufactured parts of the Work;
    - ii. In the manufacturing of spare parts for maintenance, repair or overhaul of any custom-designed or custom-manufactured part of the Work by Canada if those

parts are not available on reasonable commercial terms to enable timely maintenance, repair or overhaul.

3. The Contractor agrees to make the Background Information, including in the case of Software, the source code, promptly available to Canada for any purpose mentioned above. The license does not apply to any Software that is subject to detailed license conditions that are set out elsewhere in the Contract. Furthermore, in the case of commercial off-the-shelf software, the Contractor's obligation to make the source code promptly available to Canada applies only to source code that is within the control of or can be obtained by the Contractor or any subcontractor.

#### **4007 05 (2008-05-12) Contractor's Right to Grant Licence**

The Contractor represents and warrants that it has the right to grant to Canada the license and any other rights to use the Background Information. If the Intellectual Property Rights in any Background Information are owned by a subcontractor or any other third party, the Contractor must have a license from that subcontractor or third party that permits compliance with section 4 or arrange, without delay, for the subcontractor or third party to grant promptly the required license directly to Canada.

#### **4007 06 (2008-05-12) Waiver of Moral Rights**

If requested by Canada, during and after the Contract, the Contractor must provide a written permanent waiver of moral rights, as defined in the [Copyright Act](#), R.S., 1985, c. C-42, from every author that contributes to any Foreground Information subject to copyright protection that is a deliverable to Canada under the Contract. If the Contractor is an author of the Foreground Information, the Contractor permanently waives the Contractor's moral rights in that Foreground Information.

**9998DA TERMS OF PAYMENT**

**TP 1 Fees**

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

**TP 2 Payments to the Consultant**

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

### **TP 3 Delayed Payment**

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

### **TP 4 Claims Against, and Obligations of, the Consultant**

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

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

#### **TP 5 No Payment for Errors and Omissions**

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

#### **TP 6 Payment for Changes and Revisions**

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

#### **TP 7 Extension of Time**

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

#### **TP 8 Suspension Costs**

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

#### **TP 9 Termination Costs**

1. In the event of termination of any Call-up pursuant to GC 8 of clause 0220DA, General Conditions, *Canada* shall pay, and the *Consultant* shall accept in full settlement, an amount

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

#### **TP 10 Disbursements**

1. Subject to any provisions specifically to the contrary in the Agreement Particulars, the following disbursements reasonably incurred by the *Consultant*, that are related to the *Services* and approved by the *Agency Representative*, shall be reimbursed to the *Consultant* at actual cost:
  - (a) reproduction and delivery costs of drawings, CADD files, specifications and other Technical Documentation additional to that specified in the Project Brief;
  - (b) project related travel and accommodation additional to that specified in the Project Brief shall be reimbursed in accordance with current Treasury Board Travel Policy.
  - (c) All Travel and Living expenses must have the prior authorization of the Project Authority and comply with government's related allowance amount, rules and regulations, and are subject to government audit.
  - (d) Firms are advised that any travel time and travel-related expenses associated with the delivery of services within a 300 km radius of each major city located in each Zone as detailed herein are to be calculated as an integral part of the hourly rates. For delivery of services outside of this 300 km radius, travel-related expenses will be paid (with prior approval of the *Departmental Representative*) as specified in Appendices B, C and D of the Treasury Board Travel Directive. Major city in each zone as follow:
    - Northern Saskatchewan is Saskatoon, SK,
    - Southern Saskatchewan is Regina, SK,
    - Manitoba is Winnipeg, MB.
2. The following costs shall be included in the fees required to deliver the consultant services and shall not be reimbursed separately;
  - (a) Standard office expenses such as any photocopying, computer costs, Internet, long distance telephone and fax, including that between the *Consultant's* main office and branch offices or between the *Consultant's* offices and other team members offices;
  - (b) Plotting;
  - (c) Presentation material;
  - (d) Parking fees;
  - (e) Taxi charges;
  - (f) Travel time; and

(g) Local project office.

2. Disbursements shall be Project related and shall not include expenses that are related to the normal operation of the Consultant's business. The amounts payable shall not exceed the amount entered in the Agreement Particulars clause herein, without the prior authorization of the Agency Representative.

**TP11 Additional Services**

1. Additional services which cannot be covered under the fixed hourly rate established under the Standing Offer such as diving inspections, equipment rentals, and/or laboratory testing services, etc. and that may be required in support of the requested activities under a Call-up shall be reimbursed at actual cost.



## **9999DA      CONSULTANT SERVICES**

### **CS 1    Services**

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

### **CS 2    Standard of Care**

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

### **CS 3    Time Schedule**

The *Consultant* shall:

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

### **CS 4    Project Information, Decisions, Acceptances, Approvals**

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

### **CS 5    Changes in Services**

The *Consultant* shall:

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

### **CS 6    Codes, By-Laws, Licences, Permits**

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

### **CS 7    Provision of Staff**



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

### **CS 8 Sub-Consultants**

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

### **CS 9 Cost Control**

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

1. Throughout Project development, the *Construction Cost Estimate* prepared by the *Consultant* shall not exceed the *Construction Cost Limit*.
2. In the event that the *Consultant* considers that the *Construction Cost Estimate* will exceed the *Construction Cost Limit*, the *Consultant* shall notify the *Departmental Representative* and
  - (a) if the excess is due to factors under the control of, or reasonably foreseeable by the *Consultant*, the *Consultant* shall, if requested by the *Departmental Representative*, and at no additional cost to *Canada*, make such changes or revisions to the design as may be necessary to bring the *Construction Cost Estimate* within the *Construction Cost Limit*; or
  - (b) if the excess is due to factors that are not under the control of the *Consultant*, changes or revisions may be requested by the *Departmental Representative*. Such changes or revisions shall be undertaken by the *Consultant* at *Canada's* expense, and the cost involved shall become an amount to be mutually agreed, prior to performance of the said changes or revisions.
3. If the lowest price obtained by bid process or negotiation exceeds the *Construction Cost Limit*, and if the excess is due to reasons within the control of, or reasonably foreseeable by the *Consultant*, the *Consultant* shall, if requested by the *Departmental Representative*, and without additional charge, be fully responsible for revising the Project scope and quality as required to

reduce the construction cost and shall modify the construction documents as necessary to comply with the *Construction Cost Limit*.

## **2000DA            CALCULATION OF FEES**

### **CF 1    Fee Arrangement(s) for Services**

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

### **CF 2    Payments for Services**

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

**Required Services (RS) / Project Brief**

***RFSO – 5P301-15-0015  
Architecture – National Parks and Historic Sites in the  
provinces Manitoba and Saskatchewan***

## **Required Services (RS) / Project Brief**

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## **1 INTRODUCTION**

- 1.1 Parks Canada Agency (PCA) is inviting Architecture consulting firms to submit proposals for Standing Offer for the provision of architecture services, prime consultant services with full engineering services. This procurement will follow a one phase submission process. The selected consultants shall provide a full range of professional services in Design, Construction and Post Construction stages for the projects in the provinces of Manitoba and Saskatchewan.
- 1.2 Projects may include, but not limited to renovation, demolition, rehabilitation and/or new construction of the following types of architecture, including but not limited to:
- Administration Building: office, warden office, administrative kiosk,
  - Residential: staff housing, bunkhouse, cabins etc.,
  - General Works and Utilities: compound, office, maintenance, service, utility, storage, garage, trade shop, ancillary building/structure etc.,
  - Public Buildings: washroom, change/shower building, visitor centre, Interpretation centre/space, canteen, amphitheatre, clubhouse, boathouse, interpreted, recreational etc.,
  - Day Use Areas facilities: washroom, picnic shelter, kitchen/cook shelter, information centre/kiosk, wayside exhibit, interpretation nodes etc.,
  - Light house, fire tower, observation tower etc.
- 1.3 Consultants are required to assist PCA to provide a full range of professional services, including, but not limited to: investigation, planning, design, construction administration and post construction professional services.
- 1.4 The scope of work will vary from project to project as per each Call-up, but may include any combination of the services identified as basic services and/or additional services, including sub-consultants: landscaping architecture, hazardous material specialist, architecture, conservation architecture, civil engineering, surveying, environmental engineering, archeological services, geotechnical engineering, structural engineering, conservation structural engineering, mechanical engineering, electrical engineering, exhibit/signage/interpretive elements planning/design and/or fabrication, code and life safety consultant, cost management, scheduling management, and any other specialty professionals' services.
- 1.5 Where exhibits, signage and other interpretive elements are involved, it should be anticipated that the scope of work will vary from project to project as per each Call-up and may include but is not limited to any combination of planning, concept design, drawings, detailed design, schematic design, research and content development, interactive, audio-visual components, interpretive writing, translations, illustration, graphics, photography, fabrication/construction, shipping/delivery, installation, training etc.

## **2 PROJECT OBJECTIVES**

- 2.1 General objectives:
- .1 Deliver the project utilizing best practices in support of PCA needs, respecting the approved scope, quality, budget and schedule.
  - .2 Keep an open communication with all members of the project delivery team and stakeholders throughout all phases of the project life as identified by the Project Manager. All decisions that impact scope, quality, cost and schedule must only be discussed with the project manager.
  - .3 Provide rigorous quality assurance reviews during the design and construction administration stages, including the application of value architecture/engineering reviews in the design. Timely response to correct issues as they occur.
  - .4 Success in satisfying and where possible exceeding the expectations and needs of PCA and stakeholders.

- .5 Continuity of key personnel working in a dedicated effort for the project life.
- 2.2 Project delivery approach:
- .1 Traditional Design-Bid-Build approach.
  - .2 PCA will tender contracts through several contracting authorities. All tenders will be managed through PCA.
- 2.3 Official languages:
- .1 Final products of the Interpretive and Exhibit services, and signage will be in both official languages.
  - .2 Under this offer, services must be provided in English, unless otherwise specified.

### **3 CONSULTANT SERVICE REQUIREMENTS**

- 3.0.1 In general, the Departmental Representative will act as the Project Manager, unless otherwise requested as Additional Service in the Call-up for the Consultant to provide Project Manager Service as the role of PCA Project Manager during Construction Administration stage.
- 3.0.2 The Consultant must adhere to the General Procedures & Standards established by PWGSC outlined in Annex "A" of this Request for Standing Offers (RFSO), as may be applicable to each project (Include the Standard – see procurement). All reference to the Department of Public Works and Government Services should be deleted and replaced with Parks Canada Agency.
- 3.0.3 The selected consultants shall be expected to provide a full range of relevant architecture and engineering services including, but not limited to: planning, design, construction administration and post construction services for construction projects in Manitoba and Saskatchewan.
- 3.0.4 For Interpretive Exhibit services, Parks Canada, through their Exhibit Design, Fabrication and Installation Supply Arrangement (5P306-7797326), has pre-qualified firms specializing in exhibit development. These firms have expertise and extensive recent relevant experience providing exhibit services as required in this RFP. A list of these pre-qualified firms is included in Annex "B" should the proponent wishes to invite any of these specialized firms to be part of the proponent's team. Ensure their submission complies with this RFSO submission requirements.

#### **3.1 CONSULTANT RESPONSIBILITIES**

- 3.1.1 Prime Consultant
- .1 Also provides Architectural Services.
  - .2 The Prime Consultant is completely responsible for providing and coordinating the work of all professional disciplines required in the scope of the project Call-up, from the Project Planning, Design, Construction Administrative to the Post Construction Stages.
  - .3 The Prime consultant service is also responsible for providing and coordinating with PCA's and stakeholders' needs, including but not limited to: furniture, exhibits, signage and other interpretive elements, graphic design, and temporary alternative solution during construction period etc.
  - .4 The Prime Consultant Team shall be comprised of qualified registered professional and licensed technical expertise with extensive recent relevant and local experience capable of providing the services identified in the Standing Offer (RFSO) and Call-up for services.
  - .5 The Prime Consultant company must be licensed and permitted to practice by the professional association in the provinces of Manitoba and Saskatchewan.

- .6 The Prime Consultant and their key personnel are identified in the completed Team Identification Form. Key personnel will be involved and be responsible for every stage of the project.

### 3.1.2 Sub-Consultant

- .1 The Sub-Consultant will be required to maintain its team's expertise for the duration of the Standing Offer Agreement as identified in the bid offer.
- .2 The Sub-Consultant will be required to comply with and adhere to:
  - .1 all the requirements in the Standing Offer (RFSO) and Call-up for services,
  - .2 all commitments made and included in the Consultant's RFSO submission and in the completed Declaration Form.
- .3 The Sub-Consultant Team shall be comprised of qualified registered professional and licensed technical expertise with extensive recent relevant and local experience capable of providing the services identified in the Standing Offer (RFSO) and Call-up for services.
- .4 The Sub-Consultant company must be licensed and permitted to practice by the professional association in the provinces of Manitoba and Saskatchewan.
- .5 The Sub-Consultant and their key personnel are identified in the completed Team Identification Form. Key personnel will be involved and be responsible for every stage of the project.

## 3.2 CONSULTANT SERVICE REQUIREMENTS

### 3.2.1 Overview

- .1 The Consultant must adhere to all the General Procedures and Standards outlined in the Standing Offer, as may be applicable to the projects and scope of work described herein.
- .2 The Consultant shall deliver integrated professional services, in distinct stages, as follows:
  - Project Planning/Interpretive Planning
  - Design:
    - Pre-Design/Concept Design
    - Schematic Design
    - Design Development
    - Construction Documentation
  - Construction Administration:
    - Tender Call and Bid Evaluation
    - Construction and Contract Administration
    - As-built record documents
  - Post Construction
- .3 The outline of deliverables and process, as presented in each stage, are intended as a general outline only. It is not exhaustive and does not preclude alternative or supplementary approaches as may be suggested by the Consultant for consideration by the Departmental Representative.
- .4 Consultant shall perform the Services described herein, in accordance with the terms and conditions of the Agreement.
- .5 Consultant shall grant the right to PCA for the use of the record drawing files for maintenance, repair and modify the building in the future.

### 3.2.2 Standard of Care

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

### 3.2.3 Interpretive/Exhibit Planning & Design Services scope and requirements:

- .1 The consultant is to undertake the following work in the development of the Interpretive and exhibit component of this project.



- .1 Interpretive Plan (minimum three drafts)
  - .2 Exhibit Concept (propose three concepts, PCA chooses one, then up to three drafts)
  - .3 Content Development – including interpretive writing – can be included in concept or separate – two to three options, one style, direction approved then up to three drafts)
  - .4 Detailed Graphic Design (minimum three drafts)
  - .5 Exhibit Schematic Design (minimum three drafts)
  - .6 Final Design (include fabrication budget)
- .2 The consultant is to engage the respective professional disciplines to ensure the work outlined is included in the Interpretive and exhibit programming, but not limited to: Creative Consultation, Research and Concept Development, Project Management, Exhibit Design, Development, Art Direction and Graphic Design for exhibit and electronic media, Layout and Design Production, Writing, Editing and Proof-reading for exhibit and electronic media, Language Adaptation and Design rendering and Creative Illustration.
- .3 Creative Consultation, Research and Concept Development
- .1 The consultant will provide consultation, advice, brain storming and research services related to concept development.
- .4 Project Management
- .1 the Consultant will provide project management services covering all aspects of project management required to ensure coordinate and oversee the creative design, including but not limited to:
  - .2 design management including detailed and schematic design, (traditional/multimedia) and related support infrastructure,
  - .3 manage the workflow and budget during the complete planning and design process,
  - .4 prepare accurate design and installation schedules,
  - .5 provide quality assurance of all work completed by the Interpretive and exhibit designer and/or work completed by sub-contractors,
  - .6 ensure client and sub-consultant liaison and meetings, including seeking input and approvals at key milestones,
  - .7 provide presentations as required,
  - .8 troubleshooting,
  - .9 complete aspects of project management for writing, translation, editing and proof reading, and
  - .10 provide communication updates and information management throughout project design process.
- .5 Art Direction and Graphic Design for exhibit and electronic media
- .1 The consultant will be required to provide the following as required by the Parks representative:
    - .1 develop the design and provide three (3) acceptable graphic design concepts based on consultation with the Parks Representative. The chosen graphic design will become the property of the Crown.
    - .2 provide art direction to designers to ensure a high quality product in keeping with the approved concept and design.
    - .3 the Consultant must develop and submit a Creative Design Brief for the project.
- .6 Layout and Design Production
- .1 The Consultant will be required to complete the final layout, including but not limited to the following:
    - .1 translate electronic text files between programs;
    - .2 remove or correct formatting errors in the Suppliers own work;
    - .3 convert/format supplied text;
    - .4 remove or correcting formatting errors in client-supplied text as required by the Parks Canada representative;

- .5 prepare typographical elements as part of the design and layout of text as required. All text will be of a suitable resolution according to current industry standards for the media and the trade;
  - .6 layout copy/text and/or images to final format;
  - .7 import charts, graphs and tables for inclusion in the layout as required;
  - .8 import images (illustrative, photographic etc.) for inclusion in the layout;
  - .9 problem-solve design issues as they arise during the layout and production;
  - .10 prepare final electronic artwork for production; and
  - .11 provide other related production support related to the project-specific media.
- .7 Writing, Editing and Proof-reading for exhibit and electronic media
- .1 as required by the Parks Canada Representative, the consultant will research, write and edit texts in English for a wide-range of media;
  - .2 the consultant will provide proof reading services for copy supplied by the Parks Canada Representative;
  - .3 provide proof reading of text/copy created or revised by any of its sub-contractors is considered quality assurance steps that are the responsibility of the consultant for all requirements.
- .8 Language Adaptation
- .1 the consultant will provide language adaptation of copy written by the consultant.
  - .2 the consultant will provide language adaptation of text supplied by the Parks representative as a part of the creative graphic design, communication and marketing services.
  - .3 the consultant will provide language adaptation services which normally is required for English/French requirements for the project.
- .9 Design rendering and Creative Illustration
- .1 the consultant will create visual recordings of the concept development and the design interpretations resulting from the creative consultation.
  - .2 the consultant will be required to (but not limited to) provide the following as required by the Parks Representative:
    - .1 design preliminary design thumbnails (electronic and/or hard copy) for approval;
    - .2 design black & white sketches, if required;
    - .3 create full comprehensive creative illustrations in the size indicated by the Parks Representative;
    - .4 create graphs, tables and/or charts;
    - .5 create images for print or web;
    - .6 scan supplied photos for print or web using Web-safe colour pallets and formats;
    - .7 retouch supplied photographs and/or images as required;
    - .8 revise the selected concept to produce a final design for approval;
    - .9 prepare and provide comprehensive colour mock-ups of all design proposals and their subsequent revisions in hard copy and PDF, as per instructions from the Project Authority;
    - .10 design, create and/or modify PDF files;
    - .11 convert documents to HTML or from HTML to text format as required;
    - .12 animation and flash for web and multimedia projects.
- 3.2.4 Cost Management Services
- .1 Prepare and update work breakdown structure throughout the project.
  - .2 Throughout the project development, the Construction Cost Estimate prepared by the Consultant shall not exceed the Construction Cost Limit.
  - .3 Budget Management Services are required to provide Class D, C, B and A level estimates at different stages.
  - .4 Cost estimating and budget management shall be provided by an experienced professional architect and/or quantity surveyor.

- .5 The Class C and Class B cost estimates shall be submitted in elemental cost analysis format. The standard of acceptance for this format is the current issue of the elemental cost analysis format issued by the Canadian Institute of Quantity Surveyors. The Class A cost estimate shall be submitted in trade cost breakdown format.
- .6 Cost estimates shall have a summary plus full back-up showing items of work, quantities, unit prices and amounts.
- .7 Cost estimates shall also include Life Cycle Cost and Life Cycle Analysis to ensure sustainable design objectives are met.
- .8 In the event that the Consultant considers that the Construction Cost Estimate will exceed the Construction Cost Limit, the Consultant shall immediately notify the Departmental Representative, and
  - .1 if the excess is due to factors under the control of, or reasonably foreseeable by the Consultant, the Consultant shall, if requested by the Departmental Representative, and at no additional cost to Canada, make such changes or revisions to the design as may be necessary to bring the Construction Cost Estimate within the Construction Cost Limit; or
  - .2 if the excess is due to factors that are not under the control of the Consultant, changes or revisions may be requested by the Departmental Representative. Such changes or revisions shall be undertaken by the Consultant at Canada's expense, and the cost involved shall become an amount to be mutually agreed, prior to performance of the said changes or revisions.
- .9 Evaluate bids and assist in negotiation. If the lowest price obtained by bid process or negotiation exceeds the Construction Cost Limit, and if the excess is due to reasons within the control of, or reasonably foreseeable by the Consultant, the Consultant shall, if requested by the Departmental Representative, and without additional charge, be fully responsible for revising the project scope and quality as required to reduce the construction cost and shall modify the construction documents as necessary to comply with the Construction Cost Limit.
- .10 During construction stage, provide assistance and advice to evaluate Contemplated Change Notice value and recommend Contemplated Change Notice.
- .11 During construction stage, provide assistance to assess progress claim.

### 3.2.5 Schedule Management Services

- .1 Schedule Management Services are required to prepare and monitor the project schedule through to the completion of the design process and to monitor construction progress. Schedule Management shall generally be provided using industry accepted software to provide detailed bar charts and/or critical path schedules.
- .2 Submit in a timely manner to the Departmental Representative, for review, a time schedule for the consultant services to be performed, in detail appropriate to the size and complexity of the project, and in a format acceptable to the Departmental Representative.
- .3 Cooperate and coordinate all schedule information with the General Contractor for incorporation into the master schedule during construction.
- .4 Adhere to the approved time schedules and, if changes in the approved time schedule become necessary, indicate the extent of, and the reasons for such changes, and submit to the Departmental Representative for approval process.
- .5 Coordinate project schedule with project cash flow to assist Departmental Representative to manage funding through multiple government financial years.

### 3.2.6 Project Information, Decisions, Acceptances & Approvals

- .1 The Departmental Representative will provide, in a timely manner, project information, written decisions and requests, including acceptances and approvals relating to the Services provided by the Consultant.
- .2 No acceptance nor approval by the Departmental Representative, whether expressed or implied, shall be deemed to relieve the Consultant of the professional, technical or financial responsibility for the Services provided by the Consultant.

### 3.2.7 Changes in Services

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

### 3.2.8 Codes, Regulations, By-laws, Licenses, Permits and PCA Directives

- .1 Comply with all latest statutes, codes, regulations and by-laws applicable to the design and where necessary, review the design with authorities having jurisdiction in order that the consents, approvals, licenses and permits required for the project may be applied for and obtained. Permits include but not limited to Development Permit, Demolition Permit, Building Permit and Occupancy Permit.
- .2 Complying with National Codes, Acts and Regulations are mandatory requirements, PCA will also voluntarily comply with the applicable provincial/territorial Codes, Acts and Regulations. Where there is a conflict of the requirements, the most stringent requirements shall apply.
- .3 PCA will also voluntarily comply with the Local Provincial and Municipal Codes, Standards and Regulations. Where there is a conflict of the requirements, the most stringent requirements shall apply.
- .4 Comply with all PCA directives, regulations, guidelines, policies, standards, process and other related requirements. Where there is a conflict of the requirements, Consultant shall clarify with Department Representative to determine which requirements will take precedence.
- .5 Code and Life Safety Consultant will provide reports at project milestones to ensure the project conforms to the codes, regulations and bylaws.

### 3.2.9 Provision of Staff and Sub-Consultant Services

- .1 For proposed changes to the roles of any and all persons, including principals and key personnel, to be employed by the Consultant or Sub-Consultant to provide the Services for the Project, submit in writing, to the Departmental Representative for approval, the names, addresses, qualifications and experience of the proposed individual(s).
- .2 When fees are on a Payroll Cost basis, submit to the Departmental Representative, for approval, a statement of Payroll Costs, and any amendments thereof, for all persons to be employed by the Consultant or Sub-Consultant to provide the Services for the Project.

### 3.2.10 Project Monitoring Reporting

- .1 Provide a system for documentation and project monitoring and reporting through each stage of project delivery, for approval by the Departmental Representative.
- .2 Prepare and submit monthly progress reports in a format agreed to with the Departmental Representative. The purpose of the report will be to review and monitor the progress of the work by the Consultant. The report shall:
  - .1 identify the progress of all deliverables,
  - .2 identify all instances where the schedule or cost plan is not being met,
  - .3 outline remedial measure being taken, and
  - .4 identify any anticipated or potential problems and provide solutions to address them.

### 3.2.11 Value Architecture/Engineering Analysis

- .1 During Design stage, the Consultants shall:
  - .1 Conduct studies that provide a well-balanced emphasis on total determination of investment value that not only reduce capital and operating costs, but also provide a better overall product.
  - .2 Provide the best alternatives in terms of a value added quality performance, operating costs, environmental issues, etc.

- .3 Provide these alternatives in addition to the three (3) alternative solutions to be presented for review at the Schematic Design stage of work required in the Standing Offer.
- .4 Conduct Value Architecture/Engineering and Analysis studies during the early design stage to allow sufficient time for adoption of recommended alternatives without having any adverse effect on Project schedule.
- .5 Conduct Value Architecture/Engineering and Analysis studies using the following or similar acceptable methodology:
  - .a Approach issues in terms of OUTPUTS, rather than INPUTS, i.e., what is to be achieved rather than what needs to be done.
  - .b Create new ideas through brainstorming at the integrated design sessions with PCA staff, PCA Field Unit maintenance staff, stakeholders, Consultant members including Sub / Specialist Consultants, and industry specialists.
  - .c Evaluate ideas and obtain consensus with all concerned on a short list of preferred value-added alternatives.
  - .d Estimate Life-Cycle costs of suggested alternatives.
  - .e Rate each idea against advantages and disadvantages.
  - .f Prepare with PCA Field Unit and other interested parties, a Risk Assessment list of consequences if individual ideas are adopted or rejected.
  - .g Develop ideas into practical alternative concepts which suit current conditions.
  - .h Prepare final report of recommendations to the Departmental Representative for consideration and approval.
- .6 Incorporate approved ideas into design and construction documents in a timely fashion.
- .7 Monitor and report on implementation during construction stage of work.

### 3.2.12 Final Artwork and Source Files for all Exhibit, Signage and Interpretive Elements

- .1 The Supplier will provide all final artwork and source files in native, fully editable, platform independent, backward compatible format. In addition, all files must be supplied in EPS format with fonts converted to outlines on all vector artwork.
- .2 Parks Canada Agency will own all designs, drawings and files once projects are completed. This will ensure PCA can recreate any of the products if and when needed to ensure a cohesive look and to ensure maintenance, and or future modifications can be done.

### 3.2.13 Additional Services:

- .1 Project Management Services during construction
  - .1 Provide Project Management Service for the construction contract at the request of the Departmental Representative in the Call-up.
  - .2 When requested to do so, provide all services to manage the contract on behalf of the Departmental Representative (who is also the PCA Project Manager), taking on the role of the PCA Project Manager and all the activities and responsibilities associated with that role, through the construction stage of the project.
- .2 Other additional Services, if required, shall be determined in the manner set out in each Standing Offer Call-Up.

## 4 PROJECT PLANNING SERVICES

### 4.1 GENERAL REQUIREMENTS

- 4.1.1 The purpose of this stage is to ensure the consultant has reviewed and integrated all the project requirements, identified and evaluated conflicts or problems, provided alternative strategies, presented and received approval on a Project scope, delivery process, schedule and estimate required to deliver a cohesive quality project. This approved deliverable will

become the Project Scope of Services and will be utilized throughout the project to guide the delivery.

4.1.2 The following list identifies those reports which are required for the project and must be produced/provided by the Consultant.

- .1 Preliminary Project Reports
  - .1 Feasibility Studies;
  - .2 Options;
  - .3 Analysis or Assessment (including, but not limited to FHBRO review process, Environmental Impact Analysis etc.);
  - .4 Interpretive Exhibit Plan includes; Objectives, Target Audience, Interpretive Themes, Messages, Story lines.
- .2 Building Audit Report
  - .1 Conditions Report
  - .2 Detailed Investigation Report
  - .3 Investigation and Report (I&R)
- .3 Cost and Scheduling Reports
  - .1 Implementation Strategy and Schedule Report
  - .2 Order of Magnitude (Class D) Cost Report
- .4 Environmental and Sustainable Design Reports (including, but not limited to: Environmental Impact Assessment, Environmental Impact Analysis etc).

## **5 PRE-DESIGN SERVICES**

### **5.1 GENERAL REQUIREMENTS**

- 5.1.1 Based on the Call-up prepared by the PCA Departmental Representative, the scope of services including analysis of Project Requirements and review of deliverables.
- 5.1.2 Obtain written authorization from the Departmental Representative before proceeding with Pre-Design Services (Analysis of Project Requirements).
- 5.1.3 Review and report on all aspects of the project requirements. The Consultant will further review and analyze all available program information, consult with PCA and Authorities having Jurisdiction, and deliver a comprehensive and integrated Pre-Design Report. This report will form the basis for the scope of work for the remainder of the project and will be utilized throughout the project to guide the project delivery.

### **5.2 ROLE OF PCA**

- 5.2.1 PCA will:
- .1 Provide all available background reports and technical data;
  - .2 Provide functional program and available visitor's data;
  - .3 Provide all available drawings and plans;
  - .4 Review and provide a quality assurance report on the consultant's Pre-Design Report;
  - .5 Review revisions and consultant rebuttal to the PCA quality assurance report;
  - .6 Review and Approve the detailed work breakdown structure for the project;
  - .7 Review and Approve the final Pre-Design Report;
  - .8 Authorize consultant to proceed to Schematic Design;
  - .9 Direct concept planning and liaison with all other PCA staff on behalf of the consultant.
  - .10 Review or provide Archeological services – as per Call-up;
  - .11 Provide content resources, photographs, and other visual media where available;
  - .12 Provide translation of interpretive text; and
  - .13 Liaison all functional areas with PCA staff.

### **5.3 RESPONSIBILITIES OF THE CONSULTANT**



- 5.3.1 The scope and activities shall include, but not limited to the following:
- .1 Administrative:
    - .1 Provide information and advice during the Project Start-up meetings, workshops;
    - .2 Outline the quality management process for the consultant;
    - .3 Confirm that all necessary pre-design documentation required for this project are available and confirm that all information are still current and up-to-date. Notify the Departmental Representative of any missing and /or out-of-date reports.
  - .2 Code and Regulatory Analysis:
    - .1 Review and analyze regulatory and statutory requirements, including FHBRO in the case of heritage structure;
    - .2 Identify and verify all Authorities Having Jurisdiction over the project;
    - .3 Identify applicable codes, acts, regulations and standards; and
    - .4 Prepare Codes and Regulatory Analysis section of the “Pre-Design Report”
  - .3 Program Analysis:
    - .1 Review and analyze all available reports, studies and data provided by PCA or others.
    - .2 Prepare Program Analysis section of the “Pre-Design Report”.
  - .4 Site Analysis:
    - .1 Review and analyze all available reports, studies and data provided by PCA
      - .1 Existing site conditions;
      - .2 Existing site plans;
      - .3 Subsurface reports (geotechnical);
      - .4 surface reports (survey);
      - .5 Municipal infrastructure: Note any field investigations that will be required to verify and / or confirm existing site utilities and their capacities;
      - .6 Historical site features and National Historic Site cultural resources;
      - .7 Archaeological features;
      - .8 Environmental features, including sustainable design strategy (i.e. storm water), wild life and Environmental Impact Analysis;
    - .2 Prepare Site Analysis section of the “Pre-Design Report”.
  - .5 Building Analysis:
    - .1 including all functional considerations and future uses for interior and exterior of building/project
    - .2 floor plans, elevations
    - .3 building area
    - .4 building massing
  - .6 Budget, Schedule and Risk Analysis:
    - .1 Review and analyze the project budget and schedule data, constraints and opportunities.
    - .2 Advise and recommend budget and schedule modifications and outline risk implications and mitigation strategies,
    - .3 Prepare Class “D” estimate;
    - .4 Prepare risk implications and mitigation strategies; and
    - .5 Prepare Budget, Schedule and Risk Analysis section of the “Pre-Design Report”.

## 5.4 DELIVERABLES

- 5.4.1 Pre-Design Report:
- .1 Prepare and submit an integrated Pre-Design Report which includes all functional considerations for review and approval by the Departmental Representative.
  - .2 Revise as required by the Departmental Representative and resubmit for acceptance.
  - .3 The Report will consolidate the “Service Requirements” identified above and will be utilized as the benchmark project control document to monitor progress of the project.



- .4 The Report will be used as a basis for monthly reporting of progress and will require supplements and modifications to reflect changes in project parameters as may be identified and approved throughout the project life cycle.

5.4.2 Pre-Design Report Content - The Pre-Design Report shall include but is not limited to the following:

- .1 Executive Summary, it is intended to provide a précis of the Pre-Design Report and outline any recommendations requiring PCA approval
- .2 Codes and Regulatory Analysis
- .3 Program Analysis
- .4 Site Analysis, including Environmental Analysis, FHBRO and NHS considerations in the case of a heritage building/structure
- .5 Building Analysis, including all functional considerations and future uses for interior and exterior of building/project and applicable Standards
- .6 Interpretive/Exhibit program analysis
- .7 Budget, Schedule and Risk Analysis
- .8 Rebuttal to PCA Quality Assurance Report
- .9 Prepare and submit a written response to all comments provided by PCA

## **6 SCHEMATIC DESIGN SERVICES**

### **6.1 GENERAL REQUIREMENTS**

- 6.1.1 The Consultant must obtain written authorization from the Departmental Representative before proceeding with Schematic Design.
- 6.1.2 The objective of the Schematic Design stage is to explore three distinctly different design schemes, to allow comparison, analysis against project requirements and selection of a design direction for preparation of a final design concept.
- 6.1.3 Schematic Design is to be presented in sketch format (single line, to scale), fully integrated and supported by three distinctly different architectural solutions, along with massing models, site photographs and narrative description.
- 6.1.4 The Departmental Representative will choose one option to be further developed. Although the Consultant is required to identify a preferred option, the Departmental Representative will determine and advise the Consultant on the most appropriate option.

### **6.2 ROLE OF PCA**

- 6.2.1 PCA will:
  - .1 Organize the integrated Design Workshops;
  - .2 Review and comment on preliminary consultant submissions;
  - .3 Review and provide a quality assurance report on the consultant's Schematic Design Report;
  - .4 Review revisions and consultant rebuttal to the PCA quality assurance report;
  - .5 Review and accept the amended work breakdown structure for the project;
  - .6 Review and accept the final Schematic Design Report;
  - .7 Authorize consultant to proceed to Design Development; and
  - .8 Liaison all functional areas with PCA staff.

### **6.3 RESPONSIBILITIES OF THE CONSULTANT**

- 6.3.1 The Consultant scope and activities shall include but are not limited to the following:
  - .1 Architectural:
    - .1 Administrative:
      - a. Manage and provide information and advice during integrated Design Workshops;
      - b. Confirm quality management process for the consultant.

- .2 Regulatory: prepare Preliminary code analysis and regulations analysis.
- .3 Site Analysis and Design Options, prepare site plans including:
  - a. Site features and restrictions, based on recent survey drawings;
  - b. Influences, and existing structures;
  - c. Subsurface features;
  - d. Historical site and building features;
  - e. Archaeological features; and
  - f. Environmental features including sustainable design strategies (i.e. storm water management, hard and soft landscaping, including parking, waste management (garbage bin location and ease of access for maintenance staff), Environmental Impact Assessment etc.).
- .4 Prepare 3 Design Options:
  - a. Provide detailed functional considerations for the various designs they create,
  - b. schematic building floor plans showing main welcome, reception, and information space including spatial linkages, office space for staff, washroom locations, theatre, and Exhibit/Interpretive space, linking interior and exterior spaces;
  - c. sketch elevations and sections indicating basic design approach and aesthetic philosophy;
  - d. sketch perspectives and massing studies;
  - e. gross building areas and summary of main accommodation areas required and proposed.
- .5 Budget, Schedule and Risk Analysis, prepare and update:
  - a. Updated budget and provide Class “C” estimate for each design options;
  - b. Milestone project schedule including allowances for reviews and approvals for each stage of the project life cycle; and
  - c. Risk implications and mitigation strategies.
- .6 Design considerations, including but not limited to:
  - a. incorporate visitor safety in the design (e.g.: location of garbage cans to kitchen shelters to minimise animal/visitor conflicts, lighting, dark corners, no back doors in washroom buildings);
  - b. look for all opportunities for Parks Canada to incorporate and reflect branding and/or interpretive elements and theme decor into its products (generic look and feel);
  - c. design for CPTED – crime prevention through environmental design;
  - d. incorporate sustainable material, technology and approaches into designs;
  - e. in the case of heritage structure/buildings and National Historic Sites, adherence to the Standards and Guidelines for the Conservation of Historic Places in Canada;
  - f. all design concepts must consider and minimize ongoing maintenance, consider ease of cleaning and costs and consider replacement cost of materials.
- .2 Interpretive and exhibit:
  - .1 For exhibit, signage and interpretive elements, conduct creative consultation, research and prepare interpretive plan, 3D design brief and graphic design brief.
    - .1 In general, the designer will be required to develop and submit three acceptable concept options, each including 3D and graphic design concepts, based on consultation with the Project Manager unless otherwise requested by the Project Manager. The chosen concept and design will become property of the Crown.
- .3 Structural:

- .1 Proposed or alternative structural systems including foundation methods, explanatory sketches, etc. and a copy of the site investigation report on which the design is based:
- .2 Initial seismic and loading analysis based on site specific features and climatic conditions.
  
- .4 Mechanical:
  - .1 The schematic design submission shall include a description of specific mechanical requirements and function for each area (room) in the project. Identify any unique or specialized equipment required by the subject facility. Incorporate in the submission a schedule of requirements listing all rooms and identify the mechanical building services to be provided.
  - .2 Explain in the concept submission the manner in which the proposed mechanical systems correlate with user requirements.
  - .3 Identify the volume of outdoor air to be supplied per person.
  - .4 Identify the delivery rate of supply air to occupied spaces.
  - .5 Identify whether full time operating staff will be needed for operating any of the mechanical equipment. Differentiate between staff that is needed by code requirements versus that staff which is needed because of the nature and size of the facility.
  - .6 Identify existing and proposed size, capacity and location of entry point into the building of all mechanical services into the building.
  - .7 Identify in square meters the area to be provided for mechanical rooms, and then identify what percentage of total building area this represents. Identify location of mechanical horizontal and vertical spaces in the building.
  - .8 Analysis of alternative mechanical schemes at the schematic design stage shall reveal energy consumption of building systems, operating and maintenance costs on a month by month basis for a time span of one year. Accordingly the estimated energy, operating and maintenance costs shall be used in life cycle cost analyses in order to determine the most beneficial mechanical systems alternative. Life cycle cost analyses shall be based on a projected building life of 50 years.
  - .9 Carry out energy analysis on system alternatives.
  - .10 Establish an energy budget for the building and compare it to energy consumption of other similar buildings. Total energy consumed in the building shall be expressed in kWh/m<sup>2</sup>.
  - .11 Submit a complete energy analysis using a Canadian recognized energy analysis tool.
  - .12 Identify the type of boilers to be used (i.e. cast iron sectional, fire tube, etc.) and provide an economic and technical explanation of the reason for the type of boiler to be used.
  - .13 Propose water consumption and waste water amount for the design of the building systems and tie-in with available utility lines.
  - .14 Propose radon gas mitigation design.
  
- .5 Electrical:
  - .1 Identify existing and propose basic electrical systems of significance to the early design, including but not limited to: life safety, power (regular/emergency), lighting, communication (radio/voice/data), TV cable/satellite, and security.
  - .2 Site plan showing existing location of equipment and service entrances.
  - .3 Proposed site plan showing location of proposed equipment and service entrances.
  - .4 Distribution diagram showing single line diagrams to distribution centres.
  - .5 Floor plans complete with locations of major electrical equipment and distribution centres.

- .6 Communication systems: identify existing communication systems including radio, emergency, phone, data and cable systems. Proposed systems description.
  - .7 Propose Communication Rooms, conduits, radio and telecommunication cable systems, layout and requirements.
  - .8 Provide an electrical design synopsis, describing the electrical work in sufficient detail for assessment and approval by the Department Representative. Include feasibility and economic studies of proposed systems complete with cost figures and loads; power consumption, systems protection and energy management.
- .6 Commissioning:
- .1 Define Commissioning Requirements and Commissioning Team.
  - .2 Provide preliminary Commissioning Plan.
  - .3 Identify in square meters the area and locations to be provided to maintenance personnel, including storage and workshops for mechanical, electrical and housekeeping.
  - .4 Define project verification archives (data storage and retrieval system).
- .7 Environmental:
- .1 Produce an Environmental Assessment (Environmental Impact Analysis), if required under and Canadian Environmental Assessment Act 2012 (CEAA 2012) Screening Report; or incorporate the requirements as set out in the Evaluation of Environmental Effects (EEE) letter or report produced by PCA.
  - .2 Prepare Waste Management Plan.
  - .3 Confirm site specific requirements with the Departmental Representative.

## **6.4 DELIVERABLES**

- 6.4.1 Schematic Design Report:
- .1 Schematic Design documents illustrate the functional relationships of the project elements as well as the project's scale and character, based on the final version of the functional program, the schedule and the budget.
  - .2 The consultant shall prepare and submit a Draft Schematic Design Report including a minimum of three options for review and acceptance by the Departmental Representative.
  - .3 Revise as requested by the Departmental Representative and resubmit for formal acceptance.
  - .4 The Report will update the "Pre-Design Report", consolidate the "Service Requirements" identified above and will continue to be utilized as the benchmark project control document to monitor progress of the project. The Schematic Design Report shall be "web enabled".
  - .5 The Consultant shall deliver presentations at sessions arranged by the Departmental Representative.
- 6.4.2 Schematic Design Report Content - The Schematic Design Report shall include but is not limited to the following:
- .1 Executive Summary: it is intended to provide an outline of any recommendations requiring Departmental Representative approval,
  - .2 Codes and Regulatory Analysis,
    - a. Prepare Preliminary code analysis and regulations analysis,
    - b. Identify Authorities having Jurisdiction,
  - .3 Program Analysis and Options,
  - .4 Exhibit, signage and interpretive elements: Interpretive plan, Concept Design including 3D Design brief and Design brief,
  - .5 Analysis and Schematic Design Drawings:
    - a. Site Analysis and Design Options,
    - b. Building Analysis and Design Options,

- .6 Budget, Schedule and Risk Analysis and Class C estimate,
- .7 Rebuttal to PCA Quality Assurance Report,
- .8 Prepare and submit a written response to the Departmental Representative, to all comments provided by PCA,
- .9 Environmental Impact Analysis,
- .10 Commissioning Plan.

## **7 DESIGN DEVELOPMENT SERVICES**

### **7.1 GENERAL REQUIREMENTS**

- 7.1.1 The objective of the Design Development stage is to further refine and develop the design option selected at the Schematic Design stage.
- 7.1.2 The Consultant must obtain written authorization from the Departmental Representative before proceeding with Design Development.

### **7.2 ROLE OF PCA**

#### 7.2.1 PCA will:

- .1 Organize the Integrated Design Workshops;
- .2 Review and comment on preliminary consultant submissions;
- .3 Apply for Treasury Board "Effective Project Approval";
- .4 Review and provide a report on the consultant's Design Development Report;
- .5 Review revisions and consultant rebuttal to the PCA quality assurance report;
- .6 Review and accept the final Design Development Report;
- .7 Authorize consultant to proceed to Construction Documents;
- .7 Liaison all functional areas with PCA staff; and
- .8 Authorize consultant to proceed to Construction Documents.

### **7.3 RESPONSIBILITIES OF THE CONSULTANT**

#### 7.3.1 The Consultant scope and activities shall include but are not limited to the following:

- .1 Architectural:
  - a. Administrative:
    - .1 Manage and provide information and advice during integrated Design Workshops and meetings;
    - .2 Confirm quality management process for the consultant; and
    - .3 Update quality management process for the consultant.
  - b. Regulatory - refine, develop and prepare:
    - .1 Detailed code analysis,
    - .2 Detailed regulations analysis, and
    - .3 Present design to the Authorities Having Jurisdiction and obtain their preliminary review comments.
  - c. Building Design:
    - .1 The Consultant is responsible for all design activities including but not limited to:
      - .1 Site and Landscape plan:
        - .1 Site features and restrictions (i.e. topographical features, climatic influences, setback requirements, easements, URW, existing buildings and/or structures, parking layout, wayside exhibits, exterior signage, interpretation panels/nodes, etc.);
        - .2 Subsurface features and above grade; infrastructure/services, including type, capacities and limitations (i.e. storm water drainage, fire protection, domestic water, sewer, power, telecommunications etc.);

- .3 Archaeological features;
- .4 National Historic Site cultural resources and heritage building/structure features;
- .4 Environmental features including sustainable design strategies (i.e. surface water management, garbage removal management, storm water management, landscaping etc.);
- .2 Floor Plans of each floor showing all accommodation required with room names and calculated areas, including all necessary circulation areas, stairs, elevators, etc., and ancillary spaces anticipated for service use. Indicate building grids, modules, etc., and key dimensions;
- .3 Fixture, Furniture and Equipment plans which includes, but not limited to: a report detailing the functional considerations for the space/building – how those would look, where they would be situated, recommendations for best material;
- .4 Exhibit, signage and/or interpretation element design;
- .5 Roof Plan showing slope, drainage, roof top equipment;
- .6 Cross Sections through the building(s) to show floor levels, room heights, exterior grade elevations and roof height;
- .7 Detail Sections of walls, building envelope design features or other special design features requiring illustration and explanation at this stage, including fireproofing methods;
- .8 Demolition plans, partition plans, reflected ceiling plans, finish schedules, door/window schedules;
- .9 Elevations showing proportion/massing, material type and size, colour, texture, finishes, height, floor level, exterior grade;
- .10 Standard details and special details;
- .11 Sustainable design summary of strategies; and
- .12 Provide NMS specifications, including identification of all components and finishes, and sustainable procurement strategies.
- d. Budget, Schedule and Risk Analysis - update and prepare:
  - .1 Budget and Class “B” estimate;
  - .2 Project schedule modifications, including allowances for reviews and approvals for each stage of the project life cycle;
  - .3 Risk implications and mitigation strategies
- .2 Structural:
  - a. Drawings indicating the proposed structural framing system, structural materials, and standard, significant or unusual details proposed. Provide separate structural drawings. Include a copy of the structural load/data analysis on which the design is based on;
  - b. Update seismic and loading analysis based on site specific soil conditions and climatic conditions.
- .3 Mechanical:
  - a. Site Plan showing service entrances for water supply, sanitary and storm drains and connections to utility services, including all key invert elevations;
  - b. Drawings showing preliminary sizing of ventilation, cooling and heating systems showing locations, and all major equipment layouts in mechanical rooms;
  - c. Drawings of plumbing system, showing routing and sizing of major lines and location of pumping and other equipment where required;
  - d. Drawings of the fire protection systems showing major components;
  - e. Produce preliminary designs based on the approved schematic design. Update the energy analysis and energy budget established at the schematic design stage;
  - f. Update the schedule of requirements;



- g. Provide information of all internal and external energy loads in sufficient detail to determine the compatibility of the proposal with existing services, approved concept and energy budget;
  - h. Analysis of selected equipment and plant with schematics and calculations sufficient to justify the economy of the selected systems;
  - i. Describe the mechanical systems and the components of each system. Describe the perceived operation of the mechanical systems;
  - j. Explain what operating staff will be needed to operate the building systems and the expected functions of the operation staff;
  - k. Describe the building systems control architecture. Provide preliminary EMCS network architecture, mechanical control schematics, and sequence of operation;
  - l. Explain what acoustical and sound control measures are to be included in the design.
- .4 Electrical:
- a. Provide drawings showing advanced development of all the systems.
  - b. Provide the following data:
    - .1 Total connected load.
    - .2 Maximum demand and diversity factors.
    - .3 Sizing of standby load.
    - .4 Short-circuit requirements and calculations showing the ratings of equipment used.
  - c. Electrical drawings with:
    - .1 Floor elevations and room identification.
    - .2 Legend of all symbols used.
    - .3 Single line diagram of the power circuits with their metering and protection, including:
      - .1 Complete rating of equipment.
      - .2 Ratios and connections of CT's and PT's.
      - .3 Description of relays when used.
      - .4 Maximum short circuit levels on which design is based.
      - .5 Identification and size of services.
      - .6 Connected load and estimated maximum demand on each load centre.
    - .4 Circuit numbers at outlets and control switching identified.
    - .5 All conduit and wire sizes except for minimum sizes which should be given in the specification.
    - .6 A panel schedule with loadings for each panel.
    - .7 Telephone conduits system layout for ceiling/floor distribution
    - .8 Riser diagrams for lighting, power, telephone and telecommunication cable systems, fire alarm and other systems.
    - .9 Elementary control diagrams for each system.
    - .10 Schedule for motor and controls.
    - .11 Complete lighting layout and fixture schedule clearly indicating methods of circuiting, switching and fixture mounting.
    - .12 Electric heating layout and schedule.
- .5 Commissioning:
- a. Define Commissioning and Operation Requirements and Commissioning Team.
  - b. Provide preliminary Commissioning Plan.
  - c. Prepare a commissioning Brief describing major commissioning activities for mechanical, electrical and integrated system testing.
  - d. Define and establish project specific archives.
- .6 Environmental:



- a. Update Environmental Assessment (Environmental Impact Analysis), if required under and Canadian Environmental Assessment Act 2012 (CEAA 2012) Screening Report; or incorporate the requirements as set out in the Evaluation of Environmental Effects (EEE) letter or report produced by PCA.
- b. Update Waste Management Plan.
- c. Develop Design and explore positive environment strategies.

## **7.4 DELIVERABLES**

### **7.4.1 Design Development Report:**

- .1 The Consultant shall prepare and submit a Draft Design Development Report for review by the Departmental Representative.
- .2 Revise as requested by the Departmental Representative and resubmit for formal acceptance.
- .3 The Report will update the "Schematic Design Report", consolidate the "Service Requirements" identified above and will continue to be utilized as the benchmark project control document to monitor progress of the project. The Design Development Report shall be "web enabled".
- .4 The Consultant shall attend presentation sessions arranged by the Departmental Representative.

### **7.4.2 Design Development Report Content - The Design Development Report shall include but is not limited to the following:**

- .1 Executive Summary: it is intended to provide an outline of any recommendations requiring Departmental Representative approval.
- .2 Codes and Regulatory Analysis - update code analysis and regulations analysis.
- .3 Prepare and submit a written response to the Departmental Representative, to all comments provided by PCA.
- .4 Coordinate discipline drawings.
- .5 Coordinate and update Exhibit, signage and interpretive elements.
- .6 Update Budget, Schedule and Risk Analysis and Class B estimate.
- .7 Rebuttal to PCA Quality Assurance Report.
- .8 Update Environmental Impact Analysis.
- .9 Update Commissioning Plan.
- .10 Prepare Development Permit submission package, including but not limited to: drawings, specifications, required reports and documents, in both digital copy and paper copies along with three (3) duplicate copies of the material finishes and colour board.
- .11 Prepare documentation for inclusion in a FHBRO report, in the case of a FHBRO building, and a Cultural Resource Impact Assessment report in the case of a National Historic Site.
- .12 Confirm with the Development Officer of the PCA development review process. If Advisory Development Board (ADB) review is required, prepare ADB Plans and all the required documents. Attend ADB and public meetings and assist by providing answers to equerries when requested.
- .13 Assist Departmental Representative to apply for Development Permit, follow thru with the Permit process and provide assistance until the Permit is issued. Update approved Permit submission and re-submit as required.

## **8 CONSTRUCTION DOCUMENT SERVICES**

### **8.1 GENERAL REQUIREMENTS**

- 8.1.1 The objective of the Construction Document stage is to prepare tender ready and construction drawings and specifications, setting forth in detail all the requirements for the construction of the project along with a Class A cost estimate.
- 8.1.2 The Consultant must obtain written authorization from the Departmental Representative before proceeding with Construction Documents.

## **8.2 ROLE OF PCA**

### **8.2.1 PCA will:**

- .1 Organize Integrated Design Review Sessions at 33%, 66% and 99%, 100% stages through the construction document stage, as required;
- .2 Review and comment on each consultant submission;
- .3 Respond to questions from the Consultant as required,
- .4 Review revisions and consultant rebuttal to the PCA quality assurance report;
- .5 Review and accept the final the Construction Document progress at 33%, 66%, 99% and 100%; and
- .6 Formally accept documents ready for Tender and Construction.
- .7 Liaison all functional areas with PCA staff.

## **8.3 RESPONSIBILITIES OF THE CONSULTANT**

### **8.3.1 The Consultant Scope and activities shall include but are not limited to the following:**

- .1 Administrative:
  - .a Manage and provide information and advice during integrated Design Review Sessions and meetings;
  - .b Update quality management process for the consultant.
- .2 Regulatory:
  - .a complete detailed code and regulations analysis;
- .3 Scope and Activities:
  - .a Submit drawings and specifications at 33%, 66%, 99% and 100% stages.
  - .b Obtain acceptance for each submission at 33%, 66%, 99% and 100%.
  - .c Provide written response to all review comments and incorporate them into Construction Documents
  - .d Confirm format of drawings and specifications
  - .e Clarify special procedures (i.e. phased construction)
  - .f Advise as to the progress of cost estimates and submit updated cost estimates as the project develops
  - .g Update the project schedule
  - .h Prepare a final Class 'A' estimate
  - .i Submit all architectural and engineering calculations. Calculations submitted might not be reviewed. They are required for record purposes and in certain instances to assist in the understanding and interpretation of designs. Calculations shall be submitted in a format that is legible, neat and easily understandable.
  - .j Review and approve materials, construction processes and specifications to meet sustainable development objectives.
- .4 Technical and Production Meetings:
  - a. Production of construction documents will be reviewed during the meetings arranged by Departmental Representative and Consultant.
  - b. Representatives from PCA will be present as arranged by the Departmental Representative.
  - c. Consultant shall ensure that his staff and the sub-consultant representatives attend the technical and production meetings.
  - d. Consultant shall ensure all documents are coordinated with all sub-consultants and disciplines.
  - e. Consultant shall arrange for all necessary progress prints, data, product information etc.
  - f. Consultant shall prepare minutes of the meetings and distribute copies to all participants.
  - g. Prepare and submit a written response to the Departmental Representative, to all comments provided by PCA.

## **8.4 GENERAL DELIVERABLES**

- 8.4.1 Deliverables are similar at all three – 33%, 66% and 99% stages.
- 8.4.2 Deliverables at 100% stage is tender ready and issue for construction.

## **8.5 33%, 66%, 99% SUBMISSION DELIVERABLES**

- 8.5.1 Completeness of the work should reflect the stage of each submission at 33%, 66% and 99%.
- 8.5.2 Aspects to be included (but are not limited to) are identified below for each submission stage.
- 8.5.3 For 99% submission:
  - .1 Submit written response to the Departmental Representative to review comments made at previous submission (66%).
  - .2 Submit a final report on the application of Sustainable Development principles and strategies for the project.
  - .3 Submit one copy of updated Cost Plan, draft Class “A” (±5%) cost estimate.
  - .4 Submit one copy of updated Project Schedule.
  - .5 Provide final code analysis. Information on drawings must fully comply with codes, federal standards, PCA requirements and all other requirements in the consultant Agreement.
  - .6 Drawings and Specifications:
    - a. All construction drawings and edited specifications - fully complete.
    - b. Complete set of coordinated construction drawings and specifications, including all details, suitable for final review and effective funding approval.
    - c. Written contributions specific to the tender form and Invitation to Tender, as may be required.
  - .7 Updated documentation for inclusion in a FHBRO report, in the case of a FHBRO building, and a Cultural Resource Impact Assessment report in the case of a National Historic Site.

## **8.6 100% SUBMISSION STAGE – FINAL TENDER DOCUMENTS**

- 8.6.1 Deliverables:
  - .1 Written response to the Departmental Representative to review comments made at 99% stage.
  - .2 All original reproducible drawings and specifications for tendering purposes, 100% reviewed and coordinated, incorporating all PCA comments made at the 99% stage, either in the documents themselves, if time allows, or as an addendum during the tendering period.
  - .3 All specification sections and an index of specifications. The specifications shall consist of typed and edited NMS sections.
  - .4 Updated project implementation schedule.
  - .5 Final Class “A” cost estimate.
  - .6 Two (2) duplicate copies of signed and sealed, digitized specifications and drawing files on CD or DVD disk(s), in original and PDF (Portable Document Format), book marked by section to Departmental Representative for tender and construction.
  - .7 Plans and specifications required by Inspection/Safety Code Authorities for approval before tender call.
  - .8 Assist Departmental Representative to apply for Building Permit, follow through with the Permit process and provide assistance until the Permit is issued. Update approved Permit submission and re-submit as required.

## **9 TENDERING SERVICES**

### **9.1 GENERAL REQUIREMENTS**

- 9.1.1 PCA will undertake public tendering of the Project.

9.1.2 The Consultant's original Construction Documents (signed and sealed) are used to issue to the Government Electronic System ([Buyandsell.gc.ca](http://Buyandsell.gc.ca)) and/or to produce sets of prints required for tender call.

9.1.3 After printing, the originals are retained by PCA and the Consultant is provided with sets of prints as needed, for use by the Consultant during the tender and construction phases.

## **9.2 BIDDERS CONFERENCE**

9.2.1 During the tender period, the Contracting Authority may, at the request of a potential offeror, arrange a Bidders Conference to clarify its requirements.

9.2.2 The Consultant with their Sub-Consultants and Specialist Consultants, must attend any tender meeting, mandatory/optional site meeting.

9.2.3 Questions arising in such meetings will be answered by written addenda only, issued by the Contracting Authority.

9.2.4 All enquiries from bidders during the tender period shall be forwarded immediately to the Contracting Authority named on the front page of the Invitation to Tender, without providing any information to the inquirers. The Contracting Authority will obtain technical answers through the Departmental Representative and will publish both questions and answers to all bidders at the same time, and will issue clarifications without publication.

## **9.3 DOCUMENT INTERPRETATION**

9.3.1 Provide the Departmental Representative with all information required by tenderers to fully interpret the Construction Documents, including sample boards, colour boards and other special reports.

## **9.4 ADDENDA**

9.4.1 Addenda to Tender Documents are to be prepared, as required, by the Consultant and submitted to the Departmental Representative, then forwarded to Contracting Authority.

9.4.2 Addenda to Tender Documents are issued through the Contracting Authority to all recipients of the Tender Documents.

9.4.3 The Contracting Authority will issue all addenda in writing (no information is to be issued orally), and may issue an addendum by facsimile.

9.4.4 Normally, addenda are issued no later than seven working days before the tenders close.

## **9.5 TENDER OPENING**

9.5.1 Tenders are opened at the location stated in the advertisement.

## **9.6 PRICE NEGOTIATION**

9.6.1 If the low bid exceeds the Consultant's final Construction Cost Estimate (Class 'A' estimate) by more than 5%, PCA may negotiate with the low tenderer to reduce the price to an acceptable level without making fundamental changes to the scope of work.

9.6.2 If price reduction involves changes in the scope of work the Consultant shall:

- .1 Advise the Departmental Representative which items can be changed and the reduction in cost to be expected by negotiation.
- .2 Meet with the Contracting Officer, the Departmental Representative and the low tenderer, as required to provide information and advice during the negotiations.

## **9.7 RE-TENDERING**

9.7.1 If no satisfactory reduction can be negotiated with the low tenderer or if the desired price reduction entails significant changes in the scope of work or the character of the design, PCA may re-tender the Project.

- 9.7.2 If the Project has to be re-tendered, the Consultant shall provide advice and information to the Departmental Representative as how the re-tender should be done.
- 9.7.3 Consultant is not entitled to additional fee.

## **9.8 RE-WORK**

- 9.8.1 Consultant shall revise or amend the Construction Documents to bring the cost of the work within the limits stipulated.
- 9.8.2 Consultant is not entitled to additional fee.

## **10 CONSTRUCTION ADMINISTRATION SERVICES**

### **10.1 GENERAL**

- 10.1.1 Monitor the progress of the Contractors' work, compliance with all drawings and specifications, time schedules, quality standards and prepare progress reports, through site reviews during the construction period.
- 10.1.2 Review reports on Health and Safety strategies for construction stage of work.
- 10.1.3 Notify the Departmental Representative immediately if Human Remains, Archaeological Remains and Items of Historical or Scientific Interest are discovered on the site and obtain further information on action to be taken.
- 10.1.4 Review and process shop drawings.
- 10.1.5 Prepare and provide to the Departmental Representative, detailed drawings, clarification advice, Site Instructions, Contemplated Change Notices and Change Notices and other related consultant input documents.
- 10.1.6 Reply to Request for Information.
- 10.1.7 Observe quality assurance testing, review and accept test reports.
- 10.1.8 Report on contractors maintaining specified quality and schedules, ensuring that contractors are monitoring delivery of critical materials and equipment.
- 10.1.9 Review and make recommendations on progress claims.
- 10.1.10 Issue interim and final deficiency reports.
- 10.1.11 Finalize project documentation and accounts.
- 10.1.12 Ensure compliance with Commissioning Plan.
- 10.1.13 Recommend the release of holdback upon satisfactory completion.
- 10.1.14 Issue interim and final certifications.
- 10.1.15 Review and accept Operation and Maintenance Manuals.
- 10.1.16 Follow-up on any problems identified during the warranty period.
- 10.1.17 Provide project Management Service at the request of the Departmental Representative.

### **10.2 CONSTRUCTION SAFETY**

- 10.2.1 All construction projects that are occupied by federal employees during construction are subject to the Canada Occupational Safety and Health Act and Regulations and/or Provincial/Territorial Regulations -whichever is more restrictive.
- 10.2.2 Ensure the Contractor is mandated to provide all required coordination, isolation, protection and reinstatement of the fire protection and suppression systems throughout construction.
- 10.2.3 Notify the Property Manager each time the fire protection and suppression systems are bypassed and advise of estimated reinstatement time.
- 10.2.4 Ensure the Contractor is mandated to comply with FCC 301 and 302 and by the Fire protection Engineer.

### **10.3 PROJECT MEETINGS**

- 10.3.1 The Departmental Representative will arrange meetings every two weeks or as deemed suitable, throughout the entire construction period, for representatives from:
- .1 Stakeholders

- .2 PCA in-house staff
  - .3 Prime Consultant
  - .4 Prime Consultant's Sub-Consultants and Specialist Consultants as determined by Departmental Representative.
  - .5 Contractor and their Consultants and Subcontractors.
- 10.3.2 The Consultant shall include in the Contract documents, for provision by the contractor, requirements for a heated meeting room of sufficient size, appropriate furniture and equipment, to hold Project Meetings.
- 10.3.3 The Consultant shall record the issues and decisions and prepare and distribute minutes to all attendees within two (2) working days of the meeting.
- 10.3.4 The Prime Consultant and their proposed Sub/Specialist Consultants, should be personally available to attend all construction meetings and respond to inquiries within one (1) working day of the Departmental Representative's request, in the locality of the place of the work, from the date of the award of the Consultant agreement, until final inspection and turnover.
- 10.3.5 Review minutes for errors in fact, omissions or other discrepancies and report to the Departmental Representative.

#### **10.4 PROJECT SCHEDULE**

- 10.4.1 Immediately upon receipt of the Project Schedule from the Contractor, after Contract award, review and verify whether the schedule is reasonable and has all detailed components of work shown separately.
- 10.4.2 Provide review comments and advice to the Departmental Representative prior to the Consultant approving the project Schedule.
- 10.4.3 Use the Project Schedule as the basis for monitoring and evaluating the progress of the work.
- 10.4.4 Assist the Contractor to avoid delays by providing timely reports and advice.
- 10.4.5 Keep accurate records of causes of delays.
- 10.4.6 Record all discrepancies and recommend remedial measures to the Departmental Representative.
- 10.4.7 Any request for Time Extensions shall be submitted to Department Representative who will forward to the Contracting officer. Only the Contracting officer may approve any request for Time Extensions.

#### **10.5 BUDGET/FORECAST/CASH FLOW**

- 10.5.1 Review the value of progress of work against the approved cost breakdown. When each trade is regularly reviewed against the Project Schedule and the cost breakdown, it quickly becomes apparent whether the Contractor is on budget and is generating the appropriate cash flow for the work.
- 10.5.2 Record all discrepancies and agreed remedial measures.
- 10.5.3 Provide project financial planning/advice to the Departmental Representative, including funding commitment for the government fiscal year.

#### **10.6 SHOP DRAWINGS**

- 10.6.1 Review and process shop drawings in a timely manner.
- 10.6.2 Monitor and record the progress of shop drawing review. Record parties designated for action and follow up.
- 10.6.3 Verify the number of copies of shop drawings required. Consider additional copies for others such as Fire Protection Engineer's office and Permit Officer.
- 10.6.4 Shop drawings shall be stamped: "Checked and Certified Correct for Construction" by the Contractor and stamped: "reviewed" by the Consultant before return to the Contractor.
- 10.6.5 On completion of project, include final shop drawings in the Operating and Maintenance Manuals. Verify that shop drawings include the project number and are recorded in sequence.

#### **10.7 CLARIFICATIONS DURING CONSTRUCTION**



- 10.7.1 The Consultant must provide clarifications on Drawings and Specifications or site conditions, as required in order that the project not be delayed.
- 10.7.2 Record contractor's acknowledgment of receipt of all clarifications.
- 10.7.3 Verify and record whether an impact on cost or schedule may be expected and advise the Departmental Representative.
- 10.7.4 Provide to the Departmental Representative, any additional detail drawings, as and when required, to properly clarify or interpret the Contract documents, in a timely manner.

## **10.8 WORK MEASUREMENT**

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

## **10.9 INSPECTIONS AND SITE REVIEW**

- 10.9.1 Provide construction review services by experienced and qualified personnel to verify compliance with Contract documents. These personnel must be fully knowledgeable with technical and administrative requirements of project.
- 10.9.2 It is required that this construction review personnel play a major role in the inspection and monitoring of the Work in detail.
- 10.9.3 Establish a written understanding with contractors as to what stages or aspect of the work are to be inspected prior to being covered up.
- 10.9.4 Immediately after the award of the Construction contract and before Work begins on site, the Architect will attend and take minutes of the pre-construction meeting. The Consultant should also attend this meeting.
- 10.9.5 Assess quality of work and identify, in writing to the Departmental Representative, all defects and deficiencies observed at time of such inspections.
- 10.9.6 Inspect materials and prefabricated assemblies and components at their source or assembly plant, as necessary for the progress of the project.
- 10.9.7 Any recommendations, clarifications or deficiency lists shall be issued in writing to the Departmental Representative, with a copy to the Contractor.
- 10.9.8 Keep the Departmental Representative informed of the progress and quality of the work and report any defects or deficiencies in the work observed during the course of the site reviews.
- 10.9.9 The Contractor is responsible for recording any and all changes from the original Contract on a marked-up hard copy of drawings and then at the end of the project, check and verify the changes with the Sub-Contractors and after that forward to the Consultant. The Consultant is responsible for updating the drawing files and provides electronic version of the as-built Drawings and Specifications.
- 10.9.10 In the case of emergency where safety of persons or property is concerned, or Work is endangered by the actions of the Contractor or the elements, to safeguard the interests of PCA, the Architect shall give immediate written notice to the Departmental Representative and to the Contractor of the possible hazard. The Architect shall, if necessary, stop the work to protect the safety of the workers or Crown property or give orders for remedial work, and contact the Departmental Representative immediately for further instruction.
- 10.9.11 The Architect shall not: Authorize deviations from the Contract documents; enter into the area of the responsibility of the Contractor's Field Superintendent; stop the work unless convinced that an emergency exists as noted above; authorize any payments.

## **10.10 CONSTRUCTION CHANGES**

- 10.10.1 The Consultant does NOT have authority to change the work or the price of the Contract. Approved Change Orders must be issued to cover all changes, including those NOT affecting the cost of the project, such as schedule, substitutions, etc.



- 10.10.2 The Consultant must prepare Contemplated Change Notices (CCNs), review quotations associated with Change Orders (CO's). This includes monitoring and recording the progress of CCN's and CO's. Where Work must proceed pending issue of a Change Order, the Consultant must record time and materials expended.
- 10.10.3 Proposed changes that affect cost or design or otherwise alter the terms of the Contract must be accepted and approved by the Departmental Representative to process. Upon approval from the Departmental Representative, quotations must be obtained from the Contractor in detail. Prices are then reviewed and recommendations forwarded to the Departmental Representative.
- 10.10.4 The Departmental Representative will then forward the CCN to Contracting Authority to issue the COs to the Contractor, with a copy to Consultant.
- 10.10.5 The practice of "tradeoffs" is not allowed.

#### **10.11 CONTRACTOR'S PROGRESS PAYMENTS**

- 10.11.1 Each month, the Contractor will submit a progress claim for work and materials delivered to site as required in the Contract. The claims are made by completing the following forms where applicable:
- .1 Request for Construction Payment with supporting invoices/documents in government format,
  - .2 Cost Breakdown for Unit and/or combined Price Contract,
  - .3 Cost Breakdown for Fixed Price Contract,
  - .4 Statutory Declaration: Progress Claim, and
  - .5 Worker's Compensation Board clearance letter.
- 10.11.2 The Consultant must determine the amounts owing to the Contractor based on the progress of the work and certify payments to the Contractor.
- 10.11.3 The Consultant must review and sign designated government forms and promptly forward claims to the Departmental Representative for processing. Obtain the following information from the Contractor and submit with each progress claim:
- .1 Updated schedule of the progress of work

#### **10.12 PAYMENT FOR MATERIALS ON SITE**

- 10.12.1 The Contractor may claim for payment of material on site, but not yet incorporated in work.
- 10.12.2 Material must be stored in a secure place and protected from weather as designated by the Departmental Representative.
- 10.12.3 A detailed list, checked and verified by the Consultant, of materials with supplier's invoice showing price of each item must accompany each claim.
- 10.12.4 Items must be listed separately on the Detail Sheet showing the breakdown list and total.

#### **10.13 TESTING**

- 10.13.1 Prior to tender, the Consultant must provide the Departmental Representative with a recommended list of tests to be undertaken, including on site and factory testing. Include items in Contract specifications.
- 10.13.2 Prepare a list of allowance for the tests in the specifications, identify with a detail breakdown of the types of testing and amount.
- 10.13.3 The Consultant shall proposed testing agency to Departmental Representative for approval prior to arrange for the testing agency's services. Arrange testing, distribute test reports, and coordinate with Contractor etc. for the test.
- 10.13.4 The Consultant must review all test reports and take necessary action with Contractor when work fails to comply with contract requirements. The Departmental Representative must be immediately notified when test fails to meet project requirements and when corrective work will affect the schedule.

#### **10.14 PROTOTYPES, MOCKUPS AND SAMPLE INSTALLATIONS**

- 10.14.1 Specify explicitly the need for prototypes, mockups and sample installations where required to gain installation knowledge and specialized testing of technically advanced assemblies.
- 10.14.2 Ensure that specifications are very clear on full requirements for such prototype work including:
- .1 Specify time frames and weather conditions under which this work will be carried out.
  - .2 Note area on site plan where this is to be done.
  - .3 Bring this item to the attention of the Contractor at construction start meeting, and approve his/her methodologies and time frames for such work.
  - .4 Involve all necessary consulting disciplines, trades, suppliers, product manufacturers, testing agencies, Authorities, for a comprehensive review of the requirements and scheduled installation.
  - .5 Note where necessary, requirements for submitting of shop drawings, product information and samples well in advance, so as not to disrupt project work schedule.
- 10.14.3 Ensure sufficient observation reports, photos or videos of work undertaken are available to avoid misunderstandings at a later stage.
- 10.15 INTERIM COMPLETION**
- 10.15.1 The Contractor shall propose the site review when the project is at Interim Completion stage and provide a list of deficiencies prior to the site review. Commissioning must be completed. Commissioning Report reviewed and accepted by the Consultants and Departmental Representative.
- 10.15.2 The contractor shall arrange for an Interim Site Review with the Departmental Representative, PCA representatives, stakeholders, Consultants and major sub-contractors for the site review.
- 10.15.3 Consultants will prepare an Interim Completion report and a list of deficiencies. Upon reviewing the report, satisfy that the Work complies with Contract requirements and confirming the value of remaining work, Consultants will recommend the acceptance of Interim Completion by signing the Interim Certificate.
- 10.15.4 When PCA is also satisfied that the construction work is substantially complete, and the project is fit to be used as it is intended for, the Departmental Representative will also co-sign and issue the Interim Certificate of Completion to the Contractor; provided that the Work remaining to be done under the contract is, in the opinion of the Departmental Representative, capable of completion or correction at a cost of not more than:
- .1 3% of the first \$500,000, and
  - .2 2% of the next \$500,000, and
  - .3 1% of the balance of the value of the contract at the time this cost is calculated.
- 10.15.5 Payment to Contractor requires completion and signing, by the parties concerned, of the following documents:
- .1 Interim Certificate of Completion (Government form),
  - .2 Interim Site Review report and Acceptance,
  - .3 Progress Claim including holdback amount to be released,
  - .4 Cost Breakdown for the Fixed Price Contract and the cost for the remaining Work,
  - .5 Cost Breakdown for Unit and/or Combined Price Contract,
  - .6 Project Schedule for the remaining Work,
  - .7 Statutory Declaration for Interim Certificate of Completion, and
  - .8 Worker's Compensation Board Clearance Certificate.
- 10.15.6 The Consultant must verify that all items are correctly stated and ensure that completed documents and any supporting invoices/documents are given to the Departmental Representative for processing.
- 10.16 FINAL COMPLETION**
- 10.16.1 The Contractor shall inform Department Representative when satisfied that all work under the Contract has been completed, including all deficiency items listed during the Interim Inspection.

- 10.16.2 Contractor shall apply and obtain Occupancy Permit issued by the Authority Having Jurisdiction prior to the Final Site Review.
- 10.16.3 The contractor shall arrange for the Final Site Review with the Departmental Representative, PCA representatives, stakeholders, Acceptance Board, Consultants and major sub-contractors for the site review.
- 10.16.4 If the Work complies with Contract requirements and is satisfactory, upon recommendation from the Consultant, the Acceptance Board will accept of completion of the project.
- 10.16.5 The final payment to Contractor requires completion and signing by the parties concerned, of the following documents:
- .1 Final Certificate of Completion (Government form),
  - .2 Final Site Review report and Acceptance,
  - .3 Progress Claim including holdback amount to be released,
  - .4 Cost Breakdown for Fixed Price Contract,
  - .5 Cost Breakdown for Unit and/or Combined Price Contract,
  - .6 Statutory Declaration for Final Certificate of Completion,
  - .7 Worker's Compensation Clearance Certificate
  - .8 Trades' Certificates as appropriate
  - .9 Occupancy permit.
- 10.16.6 The Consultant must verify that all items are correctly stated and ensure that completed documents and any supporting invoices/documents are given to the Departmental Representative for processing.
- 10.16.7 The Consultant shall continue to monitor the situation and communicate with the Departmental Representative to ensure that he/she is aware of any deficiency work being delayed beyond reasonable time frames.

## **10.17 RECORD (AS-BUILT) DRAWINGS AND SPECIFICATIONS**

- 10.17.1 Consultant must produce as-built drawings for areas that show deviations in construction from the original Contract drawings, including as-built information, changes shown on Post-Contract Drawings, changes resulting from Change Orders or from on Site Instructions.
- 10.17.2 Include final survey drawing in the as-built record.
- 10.17.3 Check and verify all as-built records for completeness and accuracy prior to submitting to the Departmental Representative.
- 10.17.4 Submit Record Drawings and Specifications within three (3) weeks of Final Completion acceptance. Electronic versions are required for both Drawings and Specifications, and also in both original and pdf formats.

## **10.18 OPERATION AND MAINTENANCE MANUALS**

- 10.18.1 Submit Operation and Maintenance Manuals to Consultant for review and acceptance prior to Interim Completion, with the exception of Work that are scheduled to be performed.
- 10.18.2 Submit four (4) duplicate hard copies and two (2) duplicate digital copies of the Operation and Maintenance Manuals to Departmental representative within three (3) weeks of Final Completion acceptance.
- 10.18.3 Print project name, project number, project address, building number, contractor's name and contact information on all page.
- 10.18.4 Organized by 3 ring binders and separated by coloured dividers by specification sections.
- 10.18.4 Include a complete set of as-built Drawings and Specifications.
- 10.18.5 Include a copy of the Real Property Report, signed and sealed by the Canadian Surveyor.
- 10.18.6 Include a copy of commissioning report.
- 10.18.7 Include a copy of all products, materials, equipment and fixtures - product information (name and contact information of sub-trade, supplier and manufacturer etc.), test/approval information, operating instruction and maintenance information/schedule, spare parts, certificates, warranty and site specific final shop drawings etc.

## **11 POST CONSTRUCTION SERVICES**

## **11.1 GENERAL**

- 11.1.1 All work under the Construction Contract carries a standard twelve (12) month warranty commencing on the effective date of the issuing of Interim Certificate of Completion. Certain parts of the work, such as joints and bearings, roofing, window and exterior door, landscaping may have extended warranties as specified.
- 11.1.2 Roofing warranty is minimum 30 years and extended to the same warranty period as the specified roofing product being used.
- 11.1.3 Window and exterior door warranties are minimum 10 years and extended to the same warranty period as the specified product being used.
- 11.1.4 Landscaping warranty is extended to two (2) full growing seasons.
- 11.1.5 The Contractor is responsible for correcting and/or replacing all defects in the work during the warranty period, except for damage caused by misuse, abuse or neglect by others.
- 11.1.6 The Departmental Representative will promptly notify the Consultant in the event that defects or alleged defects appear in the work of the Contractor.
- 11.1.7 The Consultant shall investigate all defects and alleged defects in the work promptly and issue appropriate information and advice to the Departmental Representative.
- 11.1.8 The Consultant shall arrange a lesson learned meeting with the Contractor, Departmental Representative, stakeholders within four (4) weeks of Final Completion. Consultant shall provide information, advice, improvement, suggestions, constructive inputs and lessons learned for the benefit of the future projects.

## **11.2 TEN-MONTH WARRANTY INSPECTION**

- 11.2.1 Nine months after Interim Completion acceptance, the Consultant shall arrange a ten-month warranty site review with the Departmental Representative, Consultant and sub-consultants, Contractor, mechanical and electrical sub-contractors, stakeholder, PCA Maintenance staffs.
- 11.2.2 Prepare deficiency list with the Departmental Representative for the Contractor's correction/adjustment prior to the site review and distribute to the site review participants.
- 11.2.3 Update the deficiency list during the site review and distribute to the site review participants.
- 11.2.4 Inform Departmental Representative in writing when all items listed on the ten-month Warranty Inspection report have been completed satisfactorily.

## **12 PROJECT ADMINISTRATION REQUIREMENTS**

### **12.1 PROJECT MANAGEMENT**

- 12.1.1 The Departmental Representative assigned to the project is the Project Manager unless noted otherwise.
- 12.1.2 The Departmental Representative is directly concerned with the project and is responsible for its progress. The Departmental Representative is the liaison officer with the Consultant, PCA, stakeholders and Contractor.
- 12.1.3 Unless stated otherwise by the Departmental Representative, the Consultant obtains all Federal and Provincial/Territorial requirements, permits and approvals necessary for the work.
- 12.1.4 Departmental Representative might assign Project Management role to PWGSC or the prime consultant as indicated in each Standing Offer Call-up request.

### **12.2 LINES OF COMMUNICATION**

- 12.2.1 Unless otherwise requested by the Departmental Representative, the Consultant shall communicate with the Departmental Representative only.
- 12.2.2 During Construction Tender stage, Contracting Authority conducts all correspondence with bidders and award the Contract with the assistance from Departmental Representative.

12.2.3 During construction stage, Departmental Representative shall submit the CCN with Contractor's quote to Contracting Authority who will issue the Change Orders.

### **12.3 MEDIA**

12.3.1 The consultant shall not respond to request for project related information or questions from the media. Such inquires are to be directed to the Departmental Representative.

### **12.4 GENERAL DELIVERABLES**

12.4.1 Where deliverables and submissions include summaries, reports, drawings, plans, specifications and schedules, one (1) copy shall be provided to the Departmental Representative in electronic PDF format, original format and hard copies might be required as requested.

12.4.2 Deliverable submissions including, but not limited to the following:

<b>Document</b>	<b>Deliverable format</b>
.1 Written reports and studies:	Microsoft Word, Excel & Powerpoint
.2 Spreadsheets and budgets:	Microsoft Word, Excel & Powerpoint
.3 Presentations:	Microsoft Word, Excel & Powerpoint
.4 Schedules	Adobe PDF
.5 Drawings:	AutoCAD and Adobe PDF
.6 Specifications:	NMS Editable
.7 Exhibit/Interpretive Element	Adobe Creative Suite CS6 or higher, and Adobe PDF and EPS
.8 Web	Adobe PDF
.9 Internet	HTML, Macromedia Flash
.10 Alternatively, the Consultant may submit the work in pdf format. Except final drawings at any stage and record drawings must be in AutoCAD and PDF formats.	
.11 All drawings will be generated and distributed in the format using layering and file transfer protocols as prescribed in Standards and Procedures.	

### **12.5 ACCEPTANCE OF CONSULTANT DELIVERABLES**

12.5.1 While Departmental Representative acknowledges the Consultant's obligations to meet project requirements, the project delivery process entitles Departmental Representative to review the Consultant's work.

12.5.2 Consultant must obtain Departmental Representative approval at each Project stages. Departmental Representative reserves the right to reject undesirable or unsatisfactory Consultant's work.

12.5.3 Acceptances indicate that, based on a general review of material for specific issues, the material is considered to comply with governmental and departmental objectives and practices and that overall project objectives should be satisfied. The acceptance does not relieve the Consultant of professional responsibility for the project and compliance with the terms and conditions of the Contract.

12.5.4 Departmental Representative acceptances do not prohibit rejection of work which is determined to be unsatisfactory at later stages of review. If progressive design development or technical investigation reveals that earlier acceptances should be withdrawn, the Consultant is responsible for redesigning work and resubmitting for acceptance at the Consultant's cost.

### **12.6 COORDINATION WITH SUB-CONSULTANTS**

12.6.1 The Consultant shall:

- .1 Throughout all phases of the project, assume responsibility for coordinating the work of any sub-consultants and specialists retained by the Consultant or by the Departmental Representative.
- .2 Ensure clear, accurate and ongoing communication of design concept, budget, scheduling issues (including changes) and all project information are provided to the sub-consultants and specialists in a timely manner.
- .3 Coordinate input for the Departmental Representative's Risk Management Plan.
- .4 Coordinate the Quality Assurance process ensuring submissions of sub-consultants and specialists are complete and signed-off by the designated senior reviewer,
- .5 Ensure Sub-consultants and specialists provide adequate site review services and attend all required meetings.

## **12.7 PROJECT RESPONSE TIME**

- 12.7.1 Key personnel of the consultant and sub-consultants or specialist firms must be personally available to attend meetings or respond to inquiries within one (1) working day.

## **12.8 DESIGN MEETINGS**

- 12.8.1 The Departmental Representative will arrange meetings generally every two weeks throughout the design and tendering stages of the project, for representatives from:
- .1 Departmental Representative,
  - .2 Parks Canada Agency representatives,
  - .3 stakeholders,
  - .4 Consultants.
- 12.8.2 Meetings will normally be by conference calls. On occasions face to face meetings will be required.
- 12.8.3 The Consultant shall:
- .1 Attend the meetings,
  - .2 Record the issues and decisions,
  - .3 Prepare and distribute minutes within 48 hours of the meeting.
- 12.8.4 Standing agenda items shall include: schedule, cost, risk, quality, health and safety, sustainable, environmental, ecology, site specific and project specific issues.
- 12.8.5 On occasion, there may be urgent, problem-solving meetings. The Consultant must be available to attend such meetings within 24 hours' notice.

## **12.9 CONSTRUCTION MEETINGS**

- 12.9.1 The Departmental Representative will arrange meetings generally every two weeks throughout the construction period, for representatives from:
- .1 Departmental Representative,
  - .2 Parks Canada Agency functional area representatives,
  - .3 Stakeholders,
  - .4 Consultants,
  - .5 Contractor,
  - .6 Major sub-trades.
- 12.9.2 Meetings will normally be held on site, at the contractor's site office.
- 12.9.3 The Consultant shall:
- .1 Attend meetings,
  - .2 Record the issues and decisions, and
  - .3 Prepare and distribute minutes within 48 hours of the meeting.
- 12.9.4 Standing agenda items shall include: schedule, project progress, cost, changes, risk, quality, health and safety, sustainable, environmental, ecology, site specific and project specific issues.
- 12.9.5 On occasion, there may be urgent, problem-solving meetings. The Consultant must be available to attend such meetings within 24 hours' notice.



## **12.10 QUALITY ASSURANCE / VALUE FOR MONEY REVIEWS**

- 12.10.1 In concert with the Integrated Design process, Departmental Representative will conduct Value Architecture/Engineering for Money/Quality Assurance reviews on design and construction documents prepared by the Consultants. Consultants and sub-consultants must respond in writing to Departmental Representative's comments, in a timely manner and will be held accountable for delays if proper and timely responses do not occur.
- 12.10.2 Departmental Representative reviews are not intended as a check against errors or omissions contained within the documents submitted. Consultants are responsible for checking and correcting any such errors or omissions prior to submission, and regardless of any review comments by Departmental Representative.

## **13 PROJECT PARTICIPANTS**

### **13.1 FEDERAL PROJECT TEAM**

- 13.1.1 The Federal Project Team includes:
- .1 Project Leader who represents the Owner (PCA), identifies requirements and initiates projects, develops requirements in both functional and operational terms, obtain approvals and funding and participates in the selection of consultants.
  - .2 Departmental Representative who is assigned by the Project Leader and is responsible for the day-to-day management of the project. The Departmental Representative will be the Consultant's single point of contact for all project requests.
  - .3 PCA representatives. There may be numerous representatives involved in the project. These representatives will be responsible for functional issues on the project, related to their respective organizations.
  - .4 PWGSC if required.

## **14 SUBMISSIONS, REVIEW AND APPROVAL PROCESS**

### **14.1 SUBMISSIONS:**

- 14.1.1 Provide all required submissions, either to, or as identified by the Departmental Representative.
- 14.1.2 Provide a draft report to the Departmental Representative for review at the Integrated Design sessions, prior to the last meeting of the Pre-design, Schematic Design and Design Development stages.
- 14.1.3 Provide required sets of Construction Drawings and Specifications to the Departmental Representative for review at the Integrated Design sessions, at 33%, 66%, 99% and 100% stages.
- 14.1.4 Provide Construction Drawings and Specifications to the Departmental Representative ready and suitable for Tender.

### **14.2 PCA DESIGN REVIEW COMMITTEE**

- 14.2.1 The purpose of review and approval process is to ensure compliance with the project program, adherence to good design practice and technical quality assurance.
- 14.2.2 The Departmental Representative will schedule review sessions by the committee at the completion of the Pre-Design, Schematic Design, Design Development and 99% of the Construction Documentation stages.

### **14.3 OTHER AUTHORITIES HAVING JURISDICTION**



- 14.3.1 Although the Federal Government does not formally recognize jurisdictions at other levels of government, voluntary compliance with the requirements of these other levels of government is a requirement.
- 14.3.2 Codes, regulations, by laws and decisions of Authorities Having Jurisdiction will be observed. In cases of conflicts, the most stringent will apply. The Consultant shall identify other jurisdictions appropriate to the project.
- 14.3.3 PCA will voluntarily comply with the applicable provincial/territorial Occupational Health and Safety Acts and Regulations, in addition to the related Canada Occupational Safety and Health Acts and Regulations.

## **SUBMISSION REQUIREMENTS AND EVALUATION (SRE)**

- SRE 1 General Information
- SRE 2 Proposal Requirements
- SRE 3 Submission Requirements and Evaluation
- SRE 4 Price of Services
- SRE 5 Total Score
- SRE 6 Submission Requirements - Checklist

## SUBMISSION REQUIREMENTS AND EVALUATION

### SRE 1 GENERAL INFORMATION

#### 1.1 Reference to the Selection Procedure

An 'overview of the selection procedure' can be found in General Instructions (see GI 9).

#### 1.2 Submission of Proposals

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

#### 1.3 Calculation of Total Score

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

Technical Rating x 70%	=	Technical Score (Points)
Price Rating x 30%	=	Price Score (Points)
Total Score		Max. 100 Points

### SRE 2 PROPOSAL REQUIREMENTS

#### 2.1 Requirement for Proposal Format

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

- Submit one (1) bound original signed copy plus four (4) bound copies of the proposal
- One (1) electronic copy of the proposal (PDF format) on a USB thumb drive, CD or DVD
- Paper size should be - 216mm x 279mm (8.5" x 11")
- Minimum font size - 11 point Times or equal
- Minimum margins - 12 mm left, right, top, and bottom
- Double-sided submissions are preferred
- One (1) 'page' means one side of a 216mm x 279mm (8.5" x 11") sheet of paper.
- Pages that are larger than 216mm x 279mm (8.5" x 11") sheet of paper will be counted as 2 pages.
- Pages that are larger than 279mm x 432 mm (11" x 17") will be discarded.
- The proposals should be organized in the same manner and sequence as in the Request for Proposal SRE section.

#### 2.2 Specific Requirements for Proposal Format

The maximum number of pages (including text and graphics) to be submitted for the Rated Requirements under SRE 3.2 is thirty (30) pages.

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

- Covering letter
- Table of Contents
- Dividers
- CVs (curriculum vitae)
- Declaration Form (Appendix A)
- Attestation and Proof of Compliance With Occupational Health and Safety (Appendix E)
- Team Identification Format (Appendix D)
- Integrity Provisions Certifications
- Front page of the Request for Standing Offer document
- Front page of revision(s) to the Request for Standing Offer document
- Price Proposal Form (Appendix B)

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

### **SRE 3 SUBMISSION REQUIREMENTS AND EVALUATION**

#### **3.1 MANDATORY REQUIREMENTS**

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

##### **3.1.1 Declaration/Certification Form(s)**

Proponents must complete, sign and submit the following:

1. Appendix A, Declaration / Certifications Form.
2. Front page of RFSO, Revisions and Question and Answers.

##### **3.1.2 Licensing, Certification or Authorization**

The proponent must be an Architect, licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial or territorial law in the provinces indicated in the Required Services (RS 1.).

##### **3.1.3 Integrity Provisions – Associated Information**

N/A

##### **3.1.4 Consultant Team Identifications**

The proponent must identify the name of the Proponent firm, key Sub-Consultant firms, key Specialists and key personnel to be assigned to this assignment, along with their licensing and/or professional affiliation(s). An example of an acceptable format for submission of the team identification information is provided in Appendix "D".

1. The Consultant team must have expertise in architecture and engineering, licensed to provide the necessary professional architecture and engineering services to the full extent that may be required by provincial law.
2. In addition the proponent must have extensive expertise and relevant recent experience in planning, traditional design and construction or design-build, and in providing services for architecture and engineering projects.
3. In addition the proponent must show they meet the minimum experience in the following table, an example of an acceptable format for submission of the team identification information is provided in Appendix "D":

<b>#</b>	<b>Description</b>	<b>Minimum Experience</b>
1	Project Manager	Registered Arch or P. Eng. with minimum 15 years of directly related experience
2	Senior Architect	Registered Architect with minimum 15 years of directly related experience
3	Intermediate Architect	Registered Architect with minimum 7 years of directly related experience
4	Senior Conservation Architect	Registered Architect with minimum 15 years of directly related exper
5	Intermediate Conservation Architect	Registered Architect with minimum 7 years of directly related experie

6	Senior Engineer	P. Eng. with minimum 15 years of directly related experience
7	Intermediate Engineer	P. Eng. with minimum 7 years of directly related experience
8	Senior Conservation Engineer	P. Eng. with minimum 15 years of directly related experience
9	Intermediate Conservation Engineer	P. Eng. with minimum 7 years of directly related experience
10	Senior Exhibit Designer / Creative Director	Minimum 5 years of directly related experience understand the principles of interpretation. (Directly related experience must be for exhibits that are interpretive in nature.)
11	Exhibit Designer / Interpretation Planner / Interpretation Writer / Interpretive Content Developer / Graphic Designer / Exhibit Fabricator	Minimum 5 years of directly related experience understand the principles of interpretation. (Directly related experience must be for exhibits and/or interpretive elements that are interpretive in nature)
12	Senior Technician	Minimum 15 years of directly related experience
13	Intermediate Technician	Minimum 5 years of directly related experience
14	Senior Environmental Scientist	P. Biol. or B. Sc. In Environmental Science with Minimum 15 years of directly related experience
15	Intermediate Environmental Scientist	P. Biol. or B. Sc. In Environmental Science with Minimum 10 years of directly related experience
16	Senior Landscape Architect	Registered Landscape Architect with minimum 15 years of directly related experience
17	Intermediate Landscape Architect	Registered Landscape Architect with minimum 5 years of directly related experience
18	Draftsman	Minimum 5 years of directly related experience
19	Surveyor	Registered Land Surveyor minimum 10 years of directly related experience

### 3.2 RATED REQUIREMENTS

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

#### 3.2.1 Comprehension of the Scope of Services (Maximum possible points – 10)

1. *What we are looking for:*  
 A demonstration of the understanding of the overall requirements for services, including specific deliverables, expected approaches, technical expectations, and coordination requirements, especially in delivering government projects.
2. *What the Proponent should provide:*
  - a) scope of services - detailed list of services;
  - b) summary of your proposed typical work breakdown structure, i.e. resources assigned, time schedule, level of effort;
  - c) broader goals (federal image, sustainable development, sensitivities);
  - d) risk management strategy;
  - e) project management approach to working with PCA (understanding of PCA management structure, Client environment, standing offer process, working with the government in general);

#### 3.2.2 Team Approach / Management of Services (Maximum possible points – 25)

1. *What we are looking for:*
  - How the team will be organized in its approach and methodology in the delivery of the Required Services.
  - Where will the team be located for the delivery of the Required Services?
2. *What the Proponent should provide:*  
 A description of:

- (a) Roles and responsibilities of key personnel which will perform the majority of the work resulting from the individual Call-up; The key personnel for which roles and responsibilities shall be described are: **Senior Architect (also acts as prime consultant), Senior Conservation Architect, Senior Conservation Engineer, Senior Civil Engineer, Senior Environmental Engineer, Senior Geotechnical Engineer, Senior Structural Engineer, Senior Mechanical Engineer, Senior Electrical Engineer, Senior Landscape Architect and Senior Exhibit Designer/Creative Director.**
- (b) Assignment of the resources and availability of back-up personnel;
- (c) Consultant Team Structure and organization including reporting structure. (provide an Organizational Chart);
- (d) Description of the firm's approach to responding to the individual call-ups which will arise as a result of this standing offer;
- (e) Demonstration of how the team intends to meet the 'Project Response Time Requirements' ;
- (f) Quality control techniques;
- (g) Conflict resolution.

### 3.2.3 Past Experience (Maximum possible points – 35)

1. *What we are looking for:*  
Demonstration that over at least the past **five (5) years**, it or its key personnel has participated in a range of projects requiring a full scope of services in accordance with the Required Services (RS) section. The Proponent's participation in these projects must have involved the scope of services listed in the Required Services (RS) section.
2. *What the Proponent should provide:*
  - a) A brief description of a maximum of one (1) (name major new building project here) project that included planning and/or design and/or construction stages; one (1) (name major renovation/rehabilitation building project here) project that included planning and/or design and/or construction stages; one (1) government building project that included planning and/or design and/or construction stages; one (1) exhibit project that included planning and/or design and/or fabrication stages. These projects have to be relevant to this RFSO, and completed over the last five (5) years by the proponent;
  - b) For the above projects, include the names of key personnel and senior personnel who were involved as part of the project team and their respective responsibilities, as well as the scope, and budget per discipline;
  - c) Indicate the expected and actual dates the services were provided for the listed projects;
  - d) Scope of services rendered, project objectives, constraints and deliverables; and
  - e) Client references – company name, contact name, address, phone and fax of client contact at working level. Reference checks may be completed if deemed necessary.
3. The Proponent (as defined in General Instructions GI 20) must possess the knowledge on the above projects. Past project experience from entities other than the Proponent will not be considered in the evaluation unless these entities form part of a joint venture Proponent.
4. Please indicate those projects which were carried out in joint venture and the responsibilities of each of the involved entities in each project.

### 3.2.4 Key Personnel Expertise and Experience (Maximum possible points – 30)

1. *What we are looking for:*

A demonstration that the Proponent can form a team with key personnel with the capability, capacity and expertise to provide the required services and deliverables listed in the Required Services (RS) section.

2. Key Personnel shall include the **Senior Architect (also acts as prime consultant), Senior Conservation Architect, Senior Conservation Engineer, Senior Civil Engineer, Senior Environmental Engineer, Senior Geotechnical Engineer, Senior Structural Engineer, Senior Mechanical Engineer, Senior Electrical Engineer, Senior Landscape Architect and Senior Exhibit Designer/Creative Director.**
3. *What the proponent should provide: (for each key personnel)*
  - (a) Submit curriculum vitae of key personnel's of the listed in 3.2.4.2 of each discipline, which will perform a large portion of the work resulting from the individual Call-ups. Each description must clearly indicate the years and type of experience key personnel has in the provision of the services specified in the Required Services (RS) section;
  - (b) Identify the personnel's number of years with the firm;
  - (c) Education, license and professional accreditation; and
  - (d) Accomplishments/achievements/awards.

### 3.3 EVALUATION AND RATING

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

Criterion	Weight Factor	Rating	Weighted Rating
3.2.1 Comprehension of the Scope of Services	1.0	0 - 10	0 - 10
3.2.2 Team Approach / Management of Services	2.5	0 - 10	0 - 25
3.2.3 Past Experience	3.5	0 - 10	0 - 35
3.2.4 Key Personnel Expertise and Experience	3.0	0 - 10	0 - 30
<b>Total</b>			<b>0-100</b>

#### Generic Evaluation Table

PCA Evaluation Board members will evaluate the strengths and weaknesses of the Proponent's response to the evaluation criteria and will rate each criterion using the generic evaluation table below:

	INADEQUATE	WEAK	ADEQUATE	FULLY SATISFACTORY	STRONG
0 point	2 points	4 points	6 points	8 points	10 points
Did not submit information which could be evaluated	Lacks complete or almost complete understanding of the requirements.	Has some understanding of the requirements but lacks adequate understanding in some areas of the requirements.	Demonstrates a good understanding of the requirements.	Demonstrates a very good understanding of the requirements.	Demonstrates an excellent understanding of the requirements.
	Weaknesses cannot be corrected		Weaknesses can be corrected	No significant weaknesses	No apparent weaknesses



		Generally doubtful that weaknesses can be corrected			
	Proponent do not possess qualifications and experience	Proponent lacks qualifications and experience	Proponent has an acceptable level of qualifications and experience	Proponent is qualified and experienced	Proponent is highly qualified and experienced
	Team proposed is not likely able to meet requirements	Team does not cover all components or overall experience is weak	Team covers most components and will likely meet requirements	Team covers all components - some members have worked successfully together	Strong team - has worked successfully together on comparable projects
	Sample projects not related to this requirement	Sample projects generally not related to this requirement	Sample projects generally related to this requirement	Sample projects directly related to this requirement	Leads in sample projects directly related to this requirement
	Extremely poor, insufficient to meet performance requirements	Little capability to meet performance requirements	Acceptable capability, should ensure adequate results	Satisfactory capability, should ensure effective results	Superior capability, should ensure very effective results

To be considered further, proponents **must** achieve a minimum weighted rating of sixty-five (65) out of the hundred (100) points available for the rated technical criteria as specified above.

**No further consideration will be given to proponents not achieving the pass mark of sixty-five (65) points.**

#### **SRE 4 PRICE OF SERVICES**

All price proposal envelopes corresponding to responsive proposals which have achieved the pass mark of sixty-five (65) points are opened upon completion of the technical evaluation. When there are five (5) or more responsive proposals, an average price is determined by adding all the price proposals together and dividing the total by the number of price proposals being opened. This calculation will not be conducted when fewer than five (5) responsive proposals are received.

All price proposals which are greater than twenty-five percent (25%) above the average price will be set aside and receive no further consideration.

The remaining price proposals are rated as follows:

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

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

The Proponent will be required to use the Price Proposal Form as described in Appendix B to present their fee schedule for services and evaluation. Rates must be provided for all categories of staff even if specific individuals have not yet been identified for the category.

#### **SRE 5 TOTAL SCORE**

Total Scores will be established in accordance with the following:

Rating	Possible Range	% of Total Score	Score (Points)
Technical Rating	0 - 100	70	0 - 70
Price Rating	0 - 100	30	0 - 30
<b>Total Score</b>		<b>100</b>	<b>0 - 100</b>

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

## **SRE 6 SUBMISSION REQUIREMENTS - CHECKLIST**

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

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

- Declaration / Certification Form - completed and signed form provided in Appendix A
- Integrity Provisions – Associated Information - list of directors / owners
- Proposal - 1 signed original plus 4 copies (and 1 electronic copy)
- Front page of Request for Standing Offer - completed and signed
- Front page of Revision(s) to a Request for Standing Offer - completed and signed

**In a separate envelope:**

- Price Proposal form Appendix B- one (1) completed, signed and submitted in a separate envelope.**

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## APPENDIX A

Declaration / Certifications Form



**Declaration / Certifications Form (page 1 of 5)**

---

**Name of Proponent:**

**Street Address:**

**Mailing Address** (if different than street address)

**City:**

**City:**

**Prov./Terr./State:**

**Prov./Terr./State:**

**Postal/ZIP Code:**

**Postal/ZIP Code:**

**Telephone Number :**(    )

**Fax Number:**    (    )

**E-Mail:**

**Procurement Business Number:**

---

**Type of Organization**

**Size of Organization**

Sole Proprietorship

Number of Employees \_\_\_\_\_

Partnership

Graduate Architects/ \_\_\_\_\_

Corporation

Prof. Engineers:  
Other Professionals \_\_\_\_\_

Joint Venture

Technical Support \_\_\_\_\_

Other \_\_\_\_\_



## Declaration / Certifications Form (page 2 of 5)

### Federal Contractors Program for Employment Equity - Certification

I, the Proponent, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a proposal non-responsive, or may set-aside a Standing Offer, or will declare a consultant in default, if a certification is found to be untrue, whether during the proposal evaluation period, during the Standing Offer period, or during the contract period. Canada will have the right to ask for additional information to verify the Proponent's certifications. Failure to comply with any request or requirement imposed by Canada may render the proposal non-responsive, may result in the Standing Offer set-aside, or constitute a default under the contract.

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\)-Labour's website](#).

Date: \_\_\_\_\_ (YY/MM/DD) (If left blank, the date will be deemed to be the RFSO closing date.)

Complete both A and B.

A. Check one of the following:

- A1. The Proponent certifies having no work force in Canada.
- A2. The Proponent certifies being a public sector employer.
- A3. The Proponent certifies being a federally regulated employer being subject to the *Employment Equity Act*.
- A4. The Proponent certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).
- A5. The Proponent certifies having a combined workforce in Canada of 100 or more employees; and
  - A5.1. The Proponent certifies already having a valid and current Agreement to Implement Employment Equity (AIEE) in place with ESDC-Labour.

OR

- A5.2. The Proponent certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to ESDC-Labour. As this is a condition to issuance of a standing offer, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- B1. The Proponent is not a Joint Venture.

OR

- B2. The Proponent is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the General Instructions to Proponents)





## Declaration / Certifications Form (page 3 of 5)

### Former Public Servant (FPS) - Certification

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

### Definitions

For the purposes of this clause,

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

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

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

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

### Former Public Servant in Receipt of a Pension

As per the above definitions, is the Proponent a FPS in receipt of a pension? YES ( ) NO ( )

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

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

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



## Declaration / Certifications Form (page 4 of 5)

### Work Force Adjustment Directive

Is the Proponent a FPS who received a lump sum payment pursuant to the terms of a Work Force Adjustment Directive? YES ( ) NO ( )

If so, the Proponent must provide the following information:

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

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.



**Declaration / Certifications Form (page 5 of 5)**

---

**Name of Proponent:**

---

**This Declaration forms part of the offer.**

Education, Professional Accreditation and Experience:

All statements made with regard to the education, professional accreditation and the experience of individuals proposed for providing services under the Standing Offer are accurate and factual, and we are aware that Canada reserves the right to verify any information provided in this regard and that untrue statements may result in the proposal being declared non-responsive. Should a verification by Canada disclose untrue statements, Canada shall have the right to treat any standing offer resulting from this solicitation as being in default and to terminate it accordingly.

**DECLARATION:**

I, the undersigned, being a principal of the Proponent, hereby certify that the information given on this form and in the attached Proposal is accurate to the best of my knowledge.

**Name (print):** \_\_\_\_\_

**Capacity:** \_\_\_\_\_

**Signature** \_\_\_\_\_

**Telephone Number:** (    ) \_\_\_\_\_

**Fax Number:**        (    ) \_\_\_\_\_

**E-mail:** \_\_\_\_\_

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

During proposal evaluation period, Parks Canada contact will be with the above named person.

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



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## APPENDIX B

### PRICE PROPOSAL FORM

**INSTRUCTIONS**

1. Complete price proposal form and submit in a separate sealed envelope, with the Proponent's name, Solicitation Number, and "Price Proposal Form" typed on the outside.
2. Price proposals are not to include Applicable Taxes and will be evaluated in Canadian Dollars.
3. Proponents are not to alter or add information to the form.
4. It is MANDATORY that offerors submit firm prices/rates for the period of the proposed Standing Offer for all items listed. This section, when completed, will be considered as the offeror's Financial Offer.
5. Fixed hourly rates for each category are to be provided in column B and are then multiplied by the weight factor in column A. Weight Factors are for evaluation purpose only, actual usage may vary.
6. Should there be an error in the extended pricing of the offeror's offer, the unit pricing shall prevail and the extended pricing shall be corrected in the evaluation. Any errors in the quantities of the offeror's offer shall be changed to reflect the quantities stated in this document. In the event that a mathematical error occurs in carrying over the totals, PCA will correct the totals to ensure the fairness of the Proposals.
7. **Rates quoted must remain firm for the period of the Standing Offer.** GST/HST, if applicable, is not included and is to be shown as a separate item on any resulting invoice
8. In order to ensure that fair and competitive hourly rates are received for each of the positions listed, the following requirement must be strictly adhered to: Proponents must provide an hourly rate for each listed position. In the event that the firm consists of fewer personnel than listed, provide an hourly rate that corresponds with each position listed. The hourly rate provided must be equal to or greater than the hourly rate provided for the position listed below it. For example, if the firm does not have an Intermediate Personnel, the hourly rate provided must be equal to or greater than the hourly rate provided for the Junior Personnel. The hourly rate for any given category of personnel cannot be \$0 or nil value. Failure to insert an hourly rate for each position listed will render your proposal non-responsive.
9. There will be no extra payment made for overtime.
10. All Travel and Living expenses must have the prior authorization of the Project Authority and comply with government's related allowance amount, rules and regulations, and are subject to government audit.
  - a. Firms are advised that any travel time and travel-related expenses associated with the delivery of services within a 300 km radius of each major city located in each Zone as detailed herein are to be calculated as an integral part of the hourly rates. For delivery of services outside of this 300 km radius, travel-related expenses will be paid (with prior approval of the Departmental Representative) as specified in Appendices B, C and D of the Treasury Board Travel Directive.
  - b. Major city in each zone as follow:
    - i. Northern Saskatchewan is Saskatoon, SK,
    - ii. Southern Saskatchewan is Regina, SK,
    - iii. Manitoba is Winnipeg, MB.

**PRICE PROPOSAL**

**Appendix “B”**

**Name of Proponent:** \_\_\_\_\_

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

**Procurement Business Number (PBN):** \_\_\_\_\_

**TABLE ONE: STANDING OFFER - YEAR ONE – Starting on Award Date**

<b>Category of Personnel Standing Offer Year One (1)</b>	<b>Weight Factor (A)</b>	<b>Fixed Hourly Rate (B)</b>	<b>Total (A X B)</b>
Project Manager (Additional Service)	200		
<b>Architecture:</b>	-----	-----	-----
Senior Architect	150	\$	\$
Intermediate Architect	300	\$	\$
Junior Architect	300	\$	\$
Senior Architectural Technician	300	\$	\$
Intermediate Architectural Technician	150	\$	\$
Junior Architectural Technician	150	\$	\$
<b>Structural Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Mechanical Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$

Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Electrical Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Exhibit/Signage/Interpretive Designer:</b>	-----	-----	-----
Senior Exhibit Specialist / Creative Director	300	\$	\$
Intermediate Exhibit Specialist	200	\$	\$
Interpretive Planning Specialist	300	\$	\$
Senior Graphic Designer	300	\$	\$
Intermediate Graphic Designer	200	\$	\$
Interpretive Writer	150	\$	\$
Interpretive Content Developer	100	\$	\$
<b>Civil Engineer:</b>	-----	-----	-----
Senior Engineer	20	\$	\$
Intermediate Engineer	50	\$	\$
Junior Engineer	50	\$	\$
Senior Engineering Technician	20	\$	\$
Intermediate Engineering Technician	20	\$	\$
Junior Engineering Technician	20	\$	\$
<b>Geological Engineer:</b>	-----	-----	-----
Senior Engineer	20	\$	\$
Intermediate Engineer	50	\$	\$
Junior Engineer	50	\$	\$
Senior Engineering Technician	20	\$	\$
Intermediate Engineering Technician	20	\$	\$



Junior Engineering Technician	20	\$	\$
<b>Environmental:</b>	-----	-----	-----
Senior Environmental Scientist	20	\$	\$
Intermediate Environmental Scientist	50	\$	\$
Junior Environmental Scientist	20	\$	\$
<b>Landscape Architect:</b>	-----	-----	-----
Senior Landscaping Architect	50	\$	\$
Intermediate Landscaping Architect	100	\$	\$
Junior Landscaping Architect	100	\$	\$
Senior Landscaping Arch Technician	100	\$	\$
Intermediate Landscaping Arch Technician	50	\$	\$
Junior Landscaping Arch Technician	50	\$	\$
<b>Conservation Architecture:</b>	-----	-----	-----
Senior Conservation Architect	50	\$	\$
Intermediate Conservation Architect	100	\$	\$
Junior Conservation Architect	100	\$	\$
Senior Conservation Arch Technician	100	\$	\$
Intermediate Conservation Arch Technician	50	\$	\$
Junior Conservation Arch Technician	50	\$	\$
<b>Conservation Structural Engineering:</b>	-----	-----	-----
Senior Conservation Engineer	50	\$	\$
Intermediate Conservation Engineer	100	\$	\$
Junior Conservation Engineer	100	\$	\$
Senior Conservation Eng Technician	100	\$	\$
Intermediate Conservation Eng Technician	50	\$	\$
Junior Conservation Eng Technician	50	\$	\$
<b>General Drafting:</b>	-----	-----	-----
Draftsman	20	\$	\$
Junior Draftsman	20	\$	\$

<b>Field Personnel:</b>	-----	-----	-----
Surveyor (includes equipment and vehicle)	150	\$	\$
<b>(a) Total for Evaluation – Year One (1) of Standing Offer</b>			\$

**TABLE TWO: STANDING OFFER - YEAR TWO**

<b>Category of Personnel Standing Offer Year Two (2)</b>	<b>Weight Factor (A)</b>	<b>Fixed Hourly Rate (B)</b>	<b>Total (A X B)</b>
Project Manager (Additional Service)	200		
<b>Architecture:</b>	-----	-----	-----
Senior Architect	150	\$	\$
Intermediate Architect	300	\$	\$
Junior Architect	300	\$	\$
Senior Architectural Technician	300	\$	\$
Intermediate Architectural Technician	150	\$	\$
Junior Architectural Technician	150	\$	\$
<b>Structural Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Mechanical Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Electrical Engineering:</b>	-----	-----	-----

Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Exhibit/Signage/Interpretive Designer:</b>	-----	-----	-----
Senior Exhibit Specialist / Creative Director	300	\$	\$
Intermediate Exhibit Specialist	200	\$	\$
Interpretive Planning Specialist	300	\$	\$
Senior Graphic Designer	300	\$	\$
Intermediate Graphic Designer	200	\$	\$
Interpretive Writer	150	\$	\$
Interpretive Content Developer	100	\$	\$
<b>Civil Engineer:</b>	-----	-----	-----
Senior Engineer	20	\$	\$
Intermediate Engineer	50	\$	\$
Junior Engineer	50	\$	\$
Senior Engineering Technician	20	\$	\$
Intermediate Engineering Technician	20	\$	\$
Junior Engineering Technician	20	\$	\$
<b>Geological Engineer:</b>	-----	-----	-----
Senior Engineer	20	\$	\$
Intermediate Engineer	50	\$	\$
Junior Engineer	50	\$	\$
Senior Engineering Technician	20	\$	\$
Intermediate Engineering Technician	20	\$	\$
Junior Engineering Technician	20	\$	\$
<b>Environmental:</b>	-----	-----	-----
Senior Environmental Scientist	20	\$	\$
Intermediate Environmental Scientist	50	\$	\$

Junior Environmental Scientist	20	\$	\$
<b>Landscape Architect:</b>	-----	-----	-----
Senior Landscaping Architect	50	\$	\$
Intermediate Landscaping Architect	100	\$	\$
Junior Landscaping Architect	100	\$	\$
Senior Landscaping Arch Technician	100	\$	\$
Intermediate Landscaping Arch Technician	50	\$	\$
Junior Landscaping Arch Technician	50	\$	\$
<b>Conservation Architecture:</b>	-----	-----	-----
Senior Conservation Architect	50	\$	\$
Intermediate Conservation Architect	100	\$	\$
Junior Conservation Architect	100	\$	\$
Senior Conservation Arch Technician	100	\$	\$
Intermediate Conservation Arch Technician	50	\$	\$
Junior Conservation Arch Technician	50	\$	\$
<b>Conservation Structural Engineering:</b>	-----	-----	-----
Senior Conservation Engineer	50	\$	\$
Intermediate Conservation Engineer	100	\$	\$
Junior Conservation Engineer	100	\$	\$
Senior Conservation Eng Technician	100	\$	\$
Intermediate Conservation Eng Technician	50	\$	\$
Junior Conservation Eng Technician	50	\$	\$
<b>General Drafting:</b>	-----	-----	-----
Draftsman	20	\$	\$
Junior Draftsman	20	\$	\$
<b>Field Personnel:</b>	-----	-----	-----
Surveyor (includes equipment and vehicle)	150	\$	\$
<b>(b) Total for Evaluation – Year Two (2) of Standing Offer</b>			\$

**TABLE THREE: STANDING OFFER – OPTION YEAR ONE**

<b>Category of Personnel Standing Offer Option Year One (1)</b>	<b>Weight Factor (A)</b>	<b>Fixed Hourly Rate (B)</b>	<b>Total (A X B)</b>
Project Manager (Additional Service)	200		
<b>Architecture:</b>	-----	-----	-----
Senior Architect	150	\$	\$
Intermediate Architect	300	\$	\$
Junior Architect	300	\$	\$
Senior Architectural Technician	300	\$	\$
Intermediate Architectural Technician	150	\$	\$
Junior Architectural Technician	150	\$	\$
<b>Structural Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Mechanical Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Electrical Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$

Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Exhibit/Signage/Interpretive Designer:</b>	-----	-----	-----
Senior Exhibit Specialist / Creative Director	300	\$	\$
Intermediate Exhibit Specialist	200	\$	\$
Interpretive Planning Specialist	300	\$	\$
Senior Graphic Designer	300	\$	\$
Intermediate Graphic Designer	200	\$	\$
Interpretive Writer	150	\$	\$
Interpretive Content Developer	100	\$	\$
<b>Civil Engineer:</b>	-----	-----	-----
Senior Engineer	20	\$	\$
Intermediate Engineer	50	\$	\$
Junior Engineer	50	\$	\$
Senior Engineering Technician	20	\$	\$
Intermediate Engineering Technician	20	\$	\$
Junior Engineering Technician	20	\$	\$
<b>Geological Engineer:</b>	-----	-----	-----
Senior Engineer	20	\$	\$
Intermediate Engineer	50	\$	\$
Junior Engineer	50	\$	\$
Senior Engineering Technician	20	\$	\$
Intermediate Engineering Technician	20	\$	\$
Junior Engineering Technician	20	\$	\$
<b>Environmental:</b>	-----	-----	-----
Senior Environmental Scientist	20	\$	\$
Intermediate Environmental Scientist	50	\$	\$
Junior Environmental Scientist	20	\$	\$
<b>Landscape Architect:</b>	-----	-----	-----
Senior Landscaping Architect	50	\$	\$

Intermediate Landscaping Architect	100	\$	\$
Junior Landscaping Architect	100	\$	\$
Senior Landscaping Arch Technician	100	\$	\$
Intermediate Landscaping Arch Technician	50	\$	\$
Junior Landscaping Arch Technician	50	\$	\$
<b>Conservation Architecture:</b>	-----	-----	-----
Senior Conservation Architect	50	\$	\$
Intermediate Conservation Architect	100	\$	\$
Junior Conservation Architect	100	\$	\$
Senior Conservation Arch Technician	100	\$	\$
Intermediate Conservation Arch Technician	50	\$	\$
Junior Conservation Arch Technician	50	\$	\$
<b>Conservation Structural Engineering:</b>	-----	-----	-----
Senior Conservation Engineer	50	\$	\$
Intermediate Conservation Engineer	100	\$	\$
Junior Conservation Engineer	100	\$	\$
Senior Conservation Eng Technician	100	\$	\$
Intermediate Conservation Eng Technician	50	\$	\$
Junior Conservation Eng Technician	50	\$	\$
<b>General Drafting:</b>	-----	-----	-----
Draftsman	20	\$	\$
Junior Draftsman	20	\$	\$
<b>Field Personnel:</b>	-----	-----	-----
Surveyor (includes equipment and vehicle)	150	\$	\$
<b>(c) Total for Evaluation – Option Year One (1) of Standing Offer</b>			\$

**TABLE THREE: STANDING OFFER – OPTION YEAR TWO**

<b>Category of Personnel Standing Offer Option Year Two (2)</b>	<b>Weight Factor (A)</b>	<b>Fixed Hourly Rate (B)</b>	<b>Total (A X B)</b>

Project Manager (Additional Service)	200		
<b>Architecture:</b>	-----	-----	-----
Senior Architect	150	\$	\$
Intermediate Architect	300	\$	\$
Junior Architect	300	\$	\$
Senior Architectural Technician	300	\$	\$
Intermediate Architectural Technician	150	\$	\$
Junior Architectural Technician	150	\$	\$
<b>Structural Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Mechanical Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Electrical Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Exhibit/Signage/Interpretive Designer:</b>	-----	-----	-----



Senior Exhibit Specialist / Creative Director	300	\$	\$
Intermediate Exhibit Specialist	200	\$	\$
Interpretive Planning Specialist	300	\$	\$
Senior Graphic Designer	300	\$	\$
Intermediate Graphic Designer	200	\$	\$
Interpretive Writer	150	\$	\$
Interpretive Content Developer	100	\$	\$
<b>Civil Engineer:</b>	-----	-----	-----
Senior Engineer	20	\$	\$
Intermediate Engineer	50	\$	\$
Junior Engineer	50	\$	\$
Senior Engineering Technician	20	\$	\$
Intermediate Engineering Technician	20	\$	\$
Junior Engineering Technician	20	\$	\$
<b>Geological Engineer:</b>	-----	-----	-----
Senior Engineer	20	\$	\$
Intermediate Engineer	50	\$	\$
Junior Engineer	50	\$	\$
Senior Engineering Technician	20	\$	\$
Intermediate Engineering Technician	20	\$	\$
Junior Engineering Technician	20	\$	\$
<b>Environmental:</b>	-----	-----	-----
Senior Environmental Scientist	20	\$	\$
Intermediate Environmental Scientist	50	\$	\$
Junior Environmental Scientist	20	\$	\$
<b>Landscape Architect:</b>	-----	-----	-----
Senior Landscaping Architect	50	\$	\$
Intermediate Landscaping Architect	100	\$	\$
Junior Landscaping Architect	100	\$	\$
Senior Landscaping Arch Technician	100	\$	\$
Intermediate Landscaping Arch Technician	50	\$	\$

Junior Landscaping Arch Technician	50	\$	\$
<b>Conservation Architecture:</b>	-----	-----	-----
Senior Conservation Architect	50	\$	\$
Intermediate Conservation Architect	100	\$	\$
Junior Conservation Architect	100	\$	\$
Senior Conservation Arch Technician	100	\$	\$
Intermediate Conservation Arch Technician	50	\$	\$
Junior Conservation Arch Technician	50	\$	\$
<b>Conservation Structural Engineering:</b>	-----	-----	-----
Senior Conservation Engineer	50	\$	\$
Intermediate Conservation Engineer	100	\$	\$
Junior Conservation Engineer	100	\$	\$
Senior Conservation Eng Technician	100	\$	\$
Intermediate Conservation Eng Technician	50	\$	\$
Junior Conservation Eng Technician	50	\$	\$
<b>General Drafting:</b>	-----	-----	-----
Draftsman	20	\$	\$
Junior Draftsman	20	\$	\$
<b>Field Personnel:</b>	-----	-----	-----
Surveyor (includes equipment and vehicle)	150	\$	\$
<b>(d) Total for Evaluation – Option Year Two (2) of Standing Offer</b>			\$

**TABLE THREE: STANDING OFFER – OPTION YEAR THREE**

Category of Personnel Standing Offer Option Year Three (3)	Weight Factor (A)	Fixed Hourly Rate (B)	Total (A X B)
Project Manager (Additional Service)	200	-	
<b>Architecture:</b>	-----	-----	-----
Senior Architect	150	\$	\$

Intermediate Architect	300	\$	\$
Junior Architect	300	\$	\$
Senior Architectural Technician	300	\$	\$
Intermediate Architectural Technician	150	\$	\$
Junior Architectural Technician	150	\$	\$
<b>Structural Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Mechanical Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Electrical Engineering:</b>	-----	-----	-----
Senior Engineer	150	\$	\$
Intermediate Engineer	300	\$	\$
Junior Engineer	300	\$	\$
Senior Engineering Technician	300	\$	\$
Intermediate Engineering Technician	150	\$	\$
Junior Engineering Technician	150	\$	\$
<b>Exhibit/Signage/Interpretive Designer:</b>	-----	-----	-----
Senior Exhibit Specialist / Creative Director	300	\$	\$
Intermediate Exhibit Specialist	200	\$	\$
Interpretive Planning Specialist	300	\$	\$
Senior Graphic Designer	300	\$	\$

Intermediate Graphic Designer	200	\$	\$
Interpretive Writer	150	\$	\$
Interpretive Content Developer	100	\$	\$
<b>Civil Engineer:</b>	-----	-----	-----
Senior Engineer	20	\$	\$
Intermediate Engineer	50	\$	\$
Junior Engineer	50	\$	\$
Senior Engineering Technician	20	\$	\$
Intermediate Engineering Technician	20	\$	\$
Junior Engineering Technician	20	\$	\$
<b>Geological Engineer:</b>	-----	-----	-----
Senior Engineer	20	\$	\$
Intermediate Engineer	50	\$	\$
Junior Engineer	50	\$	\$
Senior Engineering Technician	20	\$	\$
Intermediate Engineering Technician	20	\$	\$
Junior Engineering Technician	20	\$	\$
<b>Environmental:</b>	-----	-----	-----
Senior Environmental Scientist	20	\$	\$
Intermediate Environmental Scientist	50	\$	\$
Junior Environmental Scientist	20	\$	\$
<b>Landscape Architect:</b>	-----	-----	-----
Senior Landscaping Architect	50	\$	\$
Intermediate Landscaping Architect	100	\$	\$
Junior Landscaping Architect	100	\$	\$
Senior Landscaping Arch Technician	100	\$	\$
Intermediate Landscaping Arch Technician	50	\$	\$
Junior Landscaping Arch Technician	50	\$	\$
<b>Conservation Architecture:</b>	-----	-----	-----
Senior Conservation Architect	50	\$	\$

Intermediate Conservation Architect	100	\$	\$
Junior Conservation Architect	100	\$	\$
Senior Conservation Arch Technician	100	\$	\$
Intermediate Conservation Arch Technician	50	\$	\$
Junior Conservation Arch Technician	50	\$	\$
<b>Conservation Structural Engineering:</b>	-----	-----	-----
Senior Conservation Engineer	50	\$	\$
Intermediate Conservation Engineer	100	\$	\$
Junior Conservation Engineer	100	\$	\$
Senior Conservation Eng Technician	100	\$	\$
Intermediate Conservation Eng Technician	50	\$	\$
Junior Conservation Eng Technician	50	\$	\$
<b>General Drafting:</b>	-----	-----	-----
Draftsman	20	\$	\$
Junior Draftsman	20	\$	\$
<b>Field Personnel:</b>	-----	-----	-----
Surveyor (includes equipment and vehicle)	150	\$	\$
<b>(e) Total for Evaluation – Option Year Three (3) of Standing Offer</b>			\$

**Total:**

**Year 1 (a) + Year 2 (b) + Option Year one (c) + Option Year two (d) + Option Year three (e) =**

**\$ \_\_\_\_\_**

**SIGNATURE OF CONSULTANT OR JOINT VENTURE CONSULTANTS**

The Consultant agrees to provide services, as required for each call up, in accordance with the time based rates quoted above. Time based rates do not apply to sub-consultants services engaged by the Architect acting as Prime Consultant. Rates charged for sub-consultants shall not exceed rates for the parallel functional activities identified above.

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Parks Canada  
Parcs Canada



## APPENDIX C

### DOING BUSINESS GUIDE



## **DOING BUSINESS GUIDE**

## **Appendix “C”**

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The Procedures and Standards established by PWGSC are attached as a separate PDF document. All reference to the Department of Public Works and Government Services Canada should be deleted and replaced with Parks Canada Agency.





Parks Canada  
Parcs Canada



**APPENDIX D**

**TEAM IDENTIFICATION FORMAT**



## TEAM IDENTIFICATION FORMAT

## Appendix "D"

For details on this format, please see item 3.1.4 of the SRE.

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

### 1. Prime Consultant (Offeror):

**Firm:** Name: \_\_\_\_\_

Key Individuals and provincial/territorial professional licensing status:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### 2. Key Sub-Consultants / Specialists:

**Firm:** Name: \_\_\_\_\_

Key Individuals and provincial/territorial professional licensing status:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## 2. Key Sub-Consultants / Specialists (cont.):

**Firm:** Name: \_\_\_\_\_

Key Individuals and provincial/territorial professional licensing status:

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**Firm:** Name: \_\_\_\_\_

Key Individuals and provincial/territorial professional licensing status:

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**Firm:** Name: \_\_\_\_\_

Key Individuals and provincial/territorial professional licensing status:

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### 3. Example of Experience Table:

For details on this format, please see item 3.1.4 of the SRE.

#	Description:	Name:	Years:	License:
1	Project Manager			
2	Senior Architect			
3	Intermediate Architect			
4	Senior Conservation Architect			
5	Intermediate Conservation Architect			
6	Senior Engineer			
7	Intermediate Engineer			
8	Senior Conservation Engineer			
9	Intermediate Conservation Engineer			
10	Senior Exhibit Designer / Creative Director			
11	Exhibit Designer / Interpretation Planner / Interpretation Writer / Interpretive Content Developer / Graphic Designer / Exhibit Fabricator			
12	Senior Technician			
13	Intermediate Technician			
14	Senior Environmental Scientist			
15	Intermediate Environmental Scientist			
16	Senior Landscape Architect			
17	Intermediate Landscape Architect			
18	Draftsman			
19	Surveyor			



## APPENDIX E

### ATTESTATION AND PROOF OF COMPLIANCE WITH OCCUPATIONAL HEALTH AND SAFETY



# ATTESTATION AND PROOF OF COMPLIANCE WITH OCCUPATIONAL HEALTH AND SAFETY

## Appendix “E”

***The following form must be completed and signed prior to commencing work on Parks Canada Sites.***

Submission of this completed form, satisfactory to Parks Canada, is a condition of gaining access to the work place.

Parks Canada recognizes that federal OHS legislation places certain specific responsibilities upon Parks Canada as owner of the work place. In order to meet those responsibilities, Parks Canada is implementing a contractor safety regime that will ensure that roles and responsibilities assigned under Part II of the *Canada Labour Code* and the *Canada Occupational Health and Safety Regulations* are implemented and observed when involving contractor(s) to undertake works in Parks Canada work places.

Parks Canada Responsible Authority/Project Lead	Address	Contact Information
Project Manager/Contracting Authority (delete as required)		
Prime Contractor		
Subcontractor(s) (add additional fields as required)		

Location of Work
------------------

General Description of Work to be Completed
---



Mark "Yes" where applicable.

	A meeting has been held to discuss hazards and access to the work place and all known and foreseeable hazards have been identified to the contractor and/or subcontractor(s)
	The contractor and/or its subcontractor(s) will comply with all federal and provincial/territorial legislation and Parks Canada's policies and procedures, regarding occupational health and safety.
	The contractor and/or its subcontractor(s) will provide all prescribed safety materials, equipment, devices and clothing.
	The contractor and/or its subcontractor(s) will ensure that its employees are familiar with and use all prescribed safety materials, equipment, devices and clothing at all times.
	The contractor and/or its subcontractor(s) will ensure that its activities do not endanger the health and safety of Parks Canada employees.
	The contractor and/or its subcontractor(s) has inspected the site and has carried out a hazard assessment and has put in place a health and safety plan and informed its employees accordingly, prior to the commencement of the work.
	Where a contractor and/or its subcontractor(s) will be storing, handling or using hazardous substances in the work place, it will place warning signs at access points warning persons of the presence of the substances and any precautions to be taken to prevent or reduce any hazard of injury or death.
	The contractor and/or its subcontractor(s) will ensure that its employees are instructed in respect of any emergency procedures applicable to the site.

I, \_\_\_\_\_ (contractor), certify that I have read, understood and attest that my firm, employees and all sub-contractors will comply with the requirements set out in this document and the terms and conditions of the contract.

Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_