



**RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:**

Regional Manager/Real Property
Contracting/PWGSC
Ontario Region, Tendering Office
12th Floor, 4900 Yonge Street
Toronto, Ontario
M2N 6A6
Ontario

**Request For a Standing Offer
Demande d'offre à commandes**

Departmental Individual Standing Offer (DISO)

Offre à commandes individuelle du département(OCID)

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

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

Comments - Commentaires

**Vendor/Firm Name and Address
Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution

Regional Manager/Real Property Contracting/PWGSC
Ontario Region, Tendering Office
12th Floor, 4900 Yonge Street
Toronto, Ontario
M2N 6A6
Ontario

Title - Sujet Building Condition Reports RFSO	
Solicitation No. - N° de l'invitation EQ755-161694/A	Date 2015-12-18
Client Reference No. - N° de référence du client EQ755-161694	GETS Ref. No. - N° de réf. de SEAG PW-\$PWL-035-2093
File No. - N° de dossier PWL-5-38148 (035)	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2016-02-02	
Time Zone Fuseau horaire Eastern Standard Time EST	
Delivery Required - Livraison exigée	
Address Enquiries to: - Adresser toutes questions à: Woodhall, Lauren	Buyer Id - Id de l'acheteur pwl035
Telephone No. - N° de téléphone (416)512-5873 ()	FAX No. - N° de FAX (416)512-5862
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Ontario Region	
Security - Sécurité This request for a Standing Offer includes provisions for security. Cette Demande d'offre à commandes comprend des dispositions en matière de sécurité.	

Instructions: See Herein

Instructions: Voir aux présentes

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

Where “Consultant” appears in this bid solicitation and the resulting Standing Offer and Call-ups, this means “Offeror” and “Contractor” in the context of the Terms, Conditions and Instructions.

REQUEST FOR STANDING OFFER (RFSO)
BUILDING CONDITION REPORTS

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PART 1 - GENERAL INFORMATION

1.1 Introduction

The Request for Standing Offers (RFSO) is divided into seven parts plus attachments and annexes, as follows:

- | | |
|--------|---|
| Part 1 | General Information: provides a general description of the requirement; |
| Part 2 | Offeror Instructions: provides the instructions applicable to the clauses and conditions of the RFSO; |
| Part 3 | Offer Preparation Instructions: provides Offerors with instructions on how to prepare their offer to address the evaluation criteria specified; |
| Part 4 | Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the offer, and the basis of selection; |
| Part 5 | Certifications: includes the certifications to be provided; |
| Part 6 | Security, Financial and Insurance Requirements: includes specific requirements that must be addressed by Offerors; and |
| Part 7 | 7A, Standing Offer, and 7B, Resulting Contract Clauses:

7A, includes the Standing Offer containing the offer from the Offeror and the applicable clauses and conditions;

7B, includes the clauses and conditions which will apply to any contract resulting from a call-up made pursuant to the Standing Offer. |

The Annexes include the Description of Services, the Basis of Payment, Insurance Requirements, Security Requirements Check List, Submission Requirements and Evaluation, Price Offer and Team Identification.

1.2 Summary

1.2.1

- (i) Public Works and Government Services Canada (PWGSC) is inviting qualified firms and individuals with the knowledge and experience of Building Condition Reports and PWGSC practices, to submit offers for Standing Offers. The selected consultants shall provide a range of services as identified in "Annex A - Description of Services".
- (ii) Offerors shall be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by federal or provincial law. Firms should be able to demonstrate successful delivery of these services for a 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 and the quality of their relevant experience in this area, as well as the cost of the provision of the services.
- (iii) It is PWGSC's intention to authorize up to three (3) Standing Offers, each for a period of three (3) years from the date of issuing the Standing Offers. The total dollar value of all

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Standing Offers is estimated to be \$3,000,000.00 (HST Included). Individual call-ups will vary, up to a maximum of \$500,000.00 (HST included). Offerors should note that there is no guarantee that the full or any amount of the Standing Offers will be called-up; PWGSC will award call-ups only when the specific services to be provided under the Standing Offer are needed. "Refer to Part 7A clause 7, Call-up Procedures.

- 1.2.2 The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Colombia Free Trade Agreement (FTA) and the Canada-Peru FTA.

1.3 Security Requirements

There are security requirements associated with the requirement of the Standing Offer. For additional information, see Part 6 - Security, Financial and Insurance Requirements, and Part 7 - Standing Offer and Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Offerors should refer to the [Industrial Security Program \(ISP\)](http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

1.4 Debriefings

Offerors may request a debriefing on the results of the request for standing offers process. Offerors should make the request to the Standing Offer Authority within 15 working days of receipt of the results of the request for standing offers process. The debriefing may be in writing, by telephone or in person.

PART 2 - OFFEROR INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

Offerors who submit an offer agree to be bound by the instructions, clauses and conditions of the RFSO and accept the clauses and conditions of the Standing Offer and resulting contract(s).

The 2006 (2015-07-03) Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

Subsection 5.4 of [2006](#), Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days

Insert: 90 days

2.2 Submission of Offers

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

Due to the nature of the Request for Standing Offers, transmission of offers by facsimile to PWGSC will not be accepted.

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, offerors 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 offers is completed, Canada will inform the Offeror 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 offer 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 Offeror a FPS in receipt of a pension? **YES () NO ()**

If so, the Offeror 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, Offerors agree that the successful Offeror's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

Work Force Adjustment Directive

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

If so, the Offeror must provide the following information:

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

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

2.4. Enquiries - Request for Standing Offers

All enquiries must be submitted in writing to the Standing Offer Authority no later than ten (10) calendar days before the Request for Standing Offers (RFSO) closing date. Enquiries received after that time may not be answered.

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

2.5. Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of Ontario.

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

2.6 Limitation of Submissions

1. An Offeror may not submit more than one offer. This limitation also applies to the persons or entities in the case of a joint venture. If more than one offer is received from an Offeror (or, in the case of a joint venture, from the persons or entities), all such offers 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 Offeror.
4. Notwithstanding paragraph 3. above, in order to avoid any conflict of interest, or any perception of conflict of interest, an Offeror shall not include in its submission another Offeror 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.

PART 3 - OFFER PREPARATION INSTRUCTIONS

3.1. Offer Preparation Instructions

Canada requests that Offerors provide their offer in separately bound sections as follows:

Section I: Technical Offer (1 original hardy copy, 4 hard copies)

Section II: Financial Offer (1 original hardy copy)

Section III: Certifications (1 original hardy copy)

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

Canada requests that Offerors follow the format instructions described below in the preparation of their offer.

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to that of the Request for Standing Offers.

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

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

Section I: Technical Offer

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

Section II: Financial Offer

Offerors must submit their financial offer in accordance with the Annex "F" Price Offer. The total amount of Applicable Taxes must be shown separately.

Section III: Certifications

Offerors must submit the certifications required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Offers will be assessed in accordance with the entire requirement of the Request for Standing Offers including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the offers.

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

Any offer which fails to meet the following mandatory requirements will be deemed non-responsive and will receive no further consideration.

- Annex "E", SRE 3.1.1 Licensing, Certification or Authorization
- Annex "E", SRE 3.1.2 Consultant Team Identification

4.1.1.2 Point Rated Technical Criteria

- Annex "E", SRE 3.2 Rated Requirements

4.1.2 Financial Evaluation

4.1.2.1 Mandatory Financial Criteria

Offerors must submit their offers in accordance with Annex "F" Price Offer. Pricing must be provided in Canadian funds.

4.1.2.2 Evaluation of Price

The price of the offer will be evaluated in Canadian dollars, Harmonized Sales Tax excluded, and in accordance with Annex "F" Price Offer.

4.1.2.3 Basis of Distribution

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; 43% of the business for the top ranked consultant, 32% for the 2nd ranked consultant and 25% for the 3rd ranked consultant. In the event fewer than three (3) consultants are successful, the undistributed % of business will be redistributed amongst the offerors being recommended using the following formula:

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

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

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4.2 Basis of Selection

4.2.1 Minimum Point Rating

- 1) To be declared responsive, an offer must:
 - a) comply with all the requirements of the Request for Standing Offers (RFSO); and
 - b) meet all Mandatory Technical Criteria; and
 - c) obtain the required minimum of 60 points overall for the Technical Evaluation Criteria which are subject to point rating. The rating is performed on a scale of 100 points.
- 2) Offers not meeting (a), (b) and (c) above will be declared non-responsive. The responsive offer(s) with the lowest evaluated price(s) will be recommended for issuance of a Standing Offer.

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Offerors must provide the required certifications and additional information to be issued a standing offer.

The certifications provided by Offerors to Canada are subject to verification by Canada at all times. Canada will declare an offer non-responsive, will have the right to set-aside a standing offer, or will declare a contractor in default if any certification made by the Offeror is found to be untrue whether made knowingly or unknowingly during the offer evaluation period, during the Standing Offer period, or during the contract period.

The Standing Offer Authority will have the right to ask for additional information to verify the Offeror's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Standing Offer Authority will render the offer non-responsive, result in the setting aside of the Standing Offer or constitute a default under the Contract.

5.1 Certifications Required with the Offer

Offerors must submit the following duly completed certifications as part of their offer.

5.1.1 Declaration of Convicted Offences

As applicable, pursuant to subsection Declaration of Convicted Offences of section 01 of the Standard Instructions, the Offeror must provide with its offer, a completed [Declaration Form](http://www.tpsgc-pwgsc.gc.ca/ci-if/formulaire-form-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/formulaire-form-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications Precedent to the Issuance of a Standing Offer and Additional Information

The certifications and additional information listed below should be submitted with the offer, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Standing Offer Authority will inform the Offeror of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the offer non-responsive.

5.2.1 Integrity Provisions – List of Names

Offerors who are incorporated, including those submitting offers as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Offeror.

Offerors submitting offers as sole proprietorship, as well as those submitting offers as a joint venture, must provide the name of the owner(s).

Offerors submitting offers as societies, firms or partnerships do not need to provide lists of names.

5.2.2 Federal Contractors Program for Employment Equity - Standing Offer Certification

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

Canada will have the right to declare an offer non-responsive, or to set-aside a Standing Offer, if the Offeror, or any member of the Offeror if the Offeror 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.

5.3 Additional Certifications Precedent to Issuance of a Standing Offer

5.3.1 Status and Availability of Resources

The Offeror certifies that, should it be issued a standing offer as a result of the Request for Standing Offer, every individual proposed in its offer will be available to perform the Work 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 for reasons beyond its control, the Offeror is unable to provide the services of an individual named in its offer, the Offeror may propose a substitute with similar qualifications and experience. The Offeror must advise the Standing Offer Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Offeror: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

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

5.3.2 Education and Experience

The Offeror certifies that all the information provided in the résumés and supporting material submitted with its offer, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Offeror to be true and accurate. Furthermore, the Offeror warrants that every individual offered by the Offeror for the requirement is capable of performing the Work resulting from a call-up against the Standing Offer.

PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS

6.1 Security Requirements

1. Before issuance of a standing offer, the following conditions must be met:
 - (a) the Offeror must hold a valid organization security clearance as indicated in Part 7A - Standing Offer;
 - (b) the Offeror's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirements as indicated in Part 7A - Standing Offer;
 - (c) the Offeror must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
2. Offerors are reminded to obtain the required security clearance promptly. Any delay in the issuance of a standing offer to allow the successful Offeror to obtain the required clearance will be at the entire discretion of the Standing Offer Authority.
3. For additional information on security requirements, Offerors should refer to the [Industrial Security Program \(ISP\)](http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

PART 7 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

7.1 Offer

7.1.1 The Offeror offers to perform the Work in accordance with the Description of Services at Annex A".

7.2 Security Requirements

7.2.1 The following security requirements (SRCL and related clauses provided by ISP) apply and form part of the Standing Offer.

1. The Offeror must, at all times during the performance of the Contract, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Offeror personnel requiring access to sensitive work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by CISD/PWGSC.
3. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
4. The Offeror must comply with the provisions of the:
 - (a) Security Requirements Check List and security guide (if applicable), attached at Annex "D";
 - (b) Industrial Security Manual (Latest Edition).

7.3 Standard Clauses and Conditions

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

7.3.1 General Conditions

2005 (2015-09-03) General Conditions - Standing Offers - Goods or Services, apply to and form part of the Standing Offer.

7.4 Term of Standing Offer

7.4.1 Period of the Standing Offer

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

7.5. Authorities

7.5.1 Standing Offer Authority

The Standing Offer Authority is:

N° de l'invitation - Solicitation No.
EQ755-161694/A
N° de réf. du client - Client Ref. No.
EQ755-161694

N° de la modif - Amd. No.
File No. - N° du dossier
PWL-5-38148

Id de l'acheteur - Buyer ID
pw1035
N° CCC / CCC No. / N° VME - FMS

Name: Lauren Woodhall
Title: Supply Specialist
Public Works and Government Services Canada
Acquisitions Branch
Directorate: Real Property Contracting, Ontario Region
Address: 4900 Yonge St.
Toronto ON M2N 6A6

Telephone: 416-512-5873
Facsimile: 416-512-5862
E-mail address: lauren.woodhall@pwgsc-tpsgc.gc.ca

The Standing Offer Authority is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable. Upon the making of a call-up, as Contracting Authority, he is responsible for any contractual issues relating to individual call-ups made against the Standing Offer by any Identified User.

7.5.2 Departmental Representative

The Departmental Representative is the Project Authority for the Standing Offer is identified in the Call-up against the Standing Offer.

The Departmental Representative is the representative of the department or agency for whom the Work will be carried out pursuant to a Call-up against the Standing Offer and is responsible for all the technical content of the Work under the resulting Contract.

7.5.3 Offeror Standing Offer Manager *(to be completed upon issuance of Standing Offer)*

Name: _____
Title: _____
Firm: _____

Address: _____

Telephone: _____ - _____ - _____
Facsimile: _____ - _____ - _____
E-mail address: _____

The Offeror Standing Offer Manager, who is permanently based at the Consultant's location, and holds a Senior Executive position in the Consultant's organization, at minimum shall:

1. Be the primary contact and the recipient of individual Call-ups under the Standing Offer, and be the formal issuer of Consultant's proposal or refusal in regards to all Call-ups;
2. Ensure that each individual Call-up is responded to with a binding "yes" or a "no" within five (5) working days of its issue to the Consultant. Ensure that Call-up proposal is submitted by the Consultant by the deadline stipulated by the Departmental Representative, of the Call-up issue;
3. Be the primary contact for the Departmental Representative regarding performance and/or quality issues arising during a Call-up project execution by the Consultant Team. A maximum response/contact time of 72 hours is required at all times;

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4. Disseminate performance and quality issues to pertinent parties within the Consultant Team and ensure that problems and difficulties are quickly and permanently resolved;
5. Ensure high quality of work delivered by the Consultant Team at all times, through on-going internal Quality Reviews. Ensure proper coordination of work and deliverables between all disciplines;
6. Ensure a comprehensive, in-depth approach to all matters pertaining to public safety and to the mandate of a Call-up;
7. Ensure timely commencement and deliveries of every portion of all projects, and timely overall project completion on each Call-up;
8. Ensure quick response time, prompt execution and on-schedule completion of all work by all members of the Consultant Team, including, if necessary, rapid replacement of notably under-performing personnel and/or sub-consultants;
9. Ensure on-going fiscal responsibility of all members of the Consultant Team;

The Standing Offer Authority and the Departmental Representative must be informed in writing by the Consultant of a departure of Consultant's Standing Offer Manager within five (5) working days of such departure.

7.5.4 Offeror's Call-up Team Leader

1. For each accepted Call-up, a Call-up Team Leader is to be designated from among senior staff of the Offeror's firm unless otherwise specified by the Departmental Representative.
2. The designated Call-up Team Leader is to be in full control of call-up project time assignments for each individual member of the Offeror's Team proposed for a specific Call-up, irrespective of and overriding member's physical location, departmental designation and otherwise normal supervisor/manager assignment.

7.6 Proactive Disclosure of Contracts with Former Public Servants

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

7.7 Identified Users

The Identified User authorized to make call-ups against the Standing Offer is:

Contracting Authority
Architectural & Engineering Consulting Services
Real Property Contracting
Acquisitions and Compensation Branch
Ontario Region
Public Works and Government Services Canada

4900 Yonge Street, 12th Floor
Toronto, ON
M2N 6A6

Tel: (416) 512-5558

Fax: (416) 512-5652

7.8 Call-up Procedures

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; 43% of the business for the top ranked consultant, 32% for the 2nd ranked consultant and 25% for the 3rd ranked consultant. In the event fewer than three (3) consultants are successful, the undistributed % of business will be redistributed amongst the offerors being recommended using the following formula:

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

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

- b) Unless otherwise stated by the Departmental Representative, the Consultant is required to respond within five (5) working days in writing to the Departmental Representative to confirm acceptance or refusal of the Call-Up. Failure to respond within the five (5) working day deadline will constitute the Consultant's declination to the Call-up.

If accepted, the Consultant will be provided the scope of services and given a reasonable deadline for submission of a proposal. The proposal submission deadline will be established by the Departmental Representative and will be based on the size and complexity of project.

Should the Consultant fail to meet the response or proposal submission deadline, Canada reserves the right not to further consider the Consultant for the call-up, and select the next consultant who is furthest away from the ideal business distribution.

- c) 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 equivalent qualification, experience and expertise 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 equivalent qualifications, experience and expertise, Canada may set aside the standing offer.
- d) 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.

- e) 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.
 - f) 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.

7.9 Call-up Instrument

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.

Any proposed changes to the scope of work are to be discussed with the Departmental Representative but any resulting changes can only be authorized in writing by an amendment issued by the Standing Offer Authority.

7.10 Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed \$500,000.00 (Applicable Taxes included).

7.11 Priority of Documents

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

- a) the call up against the Standing Offer, including any annexes;
- b) the articles of the Standing Offer;
- c) the general conditions 2005 (2015-09-03), General Conditions - Standing Offers - Goods or Services;
- d) the general conditions 2035 (2015-07-03), General Conditions – Higher Complexity Services;
- e) the supplemental general conditions 4006 (2010-08-16), Contractor to Own Intellectual Property Rights in Foreground Information
- f) Annex A, Description of Services;
- g) Annex B, Basis of Payment;
- h) Annex C, Insurance Requirements;
- i) Annex D, Security Requirements Check List;
- j) the Offeror's offer dated _____

7.12 Certifications

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pwl035
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7.12.1 Compliance

The continuous compliance with the certifications provided by the Offeror with its offer and the ongoing cooperation in providing additional information are conditions of issuance of the Standing Offer (SO). Certifications are subject to verification by Canada during the entire period of the SO and of any resulting contract that would continue beyond the period of the SO. If the Offeror does not comply with any certification, fails to provide the additional information, or if it is determined that any certification made by the Offeror in its offer is untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and set aside the Standing Offer.

7.12.2 SACC Manual Clauses

M3020C (2010-01-11) Status and Availability of Resources

7.13 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

B. RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from a call-up against the Standing Offer.

7.1 Statement of Work

The Contractor must perform the Work described in the call-up against the Standing Offer.

7.2 Standard Clauses and Conditions

7.2.1 General Conditions

2035 (2015-07-03), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

7.2.2 Supplemental General Conditions

4006 (2010-08-16) Contractor to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

7.3 Term of Contract

7.3.1 Period of the Contract

The Work must be completed in accordance with the call-up against the Standing Offer.

7.4 Proactive Disclosure of Contracts with Former Public Servants

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

7.5 Payment

7.5.1 Terms of Payment

7.5.1.1 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 7.5.2 Basis of Payment.
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.

7.5.1.2 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 7.5.1.2(a) and 7.5.2.2(b) above.
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.

7.5.1.3 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*.

7.5.1.4 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.

7.5.1.5 Disbursements

1. The following disbursements reasonably incurred by the Consultant, that are related to the *Services* and approved by the Departmental Representative, shall be reimbursed to the Consultant at actual cost:
 - (a) reproduction and delivery costs of drawings, CADD files, specifications and other *Technical Documentation* additional to that specified in the Description of *Services* or Statement of Work;
 - (b) transportation costs for material samples and models, courier and delivery charges for deliverables additional to that specified in the Description of *Services*;
 - (c) Travel and Living Expenses: Firms are advised that any travel-related expenses associated with the delivery of services will be calculated from the applicable government location (listed below) and/or from the consultant's office to the project site, which ever is

closer. Travel-related expenses will be paid (with prior approval of the Departmental Representative) in accordance with current accordance with current National Joint Council (NJC) Travel Directive (<http://www.njc-cnm.gc.ca/directive/index.php?dlabel=travel-voyage&lang=eng&did=10&merge=2>); and

The government location that will be used to calculate disbursements related to travel and living expenses is listed below:

4900 Yonge Street, Toronto, Ontario

(d) Additional services' disbursements as authorised by the Departmental Representative, including Sub-Consultants and Specialists, required in support of the requested services under a call-up and which cannot be covered under the fixed hourly rate established under the Standing Offer. The cost for these services shall be administered as follows;

i) Unless otherwise authorized by the Departmental Representative, the above mentioned disbursements shall be obtained through competitive bidding with a minimum of two (2) quotes. Copies of all quotes shall be submitted together with the Consultant proposal for the call-up; or

ii) The disbursements shall be evaluated such that, in the event that competitive quotes are not obtained, the Consultant shall submit copies of invoices from other projects to help demonstrate the quote to be a fair, reasonable and competitive price.

2. The following costs shall be included in the fees required to deliver the consultant services and shall not be reimbursed separately;

(a) Reproduction and delivery costs of drawings, CADD files, specifications and other Technical Documentation specified in the Description of Services or Statement of Work.

(b) 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;

(c) Plotting;

(d) Presentation material;

(e) Travel time;

(f) Local project office.

3. Disbursements shall be Project related and shall not include expenses that are related to the normal operation of the Consultant's business. The amounts payable, shall not exceed the amount entered in the Call-up, without the prior authorization of the Departmental Representative.

7.5.2 Basis of Payment

7.5.2.1 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. Travel Time:

Travel time during normal working hours, that is related to the Project and authorized by the Departmental Representative, shall be chargeable as time worked.

Travel time outside normal working hours, that is related to the Project and authorized by the Departmental Representative, shall be chargeable up to a maximum of three (3) hours per day, unless otherwise authorized.

(a) Normal Working Hours:

The normal working hours per day for principals, executives and Consultant's employees, shall be deemed to be seven and a half (7.5) hours of any day during which they are actually engaged in the performance of the Services.

3. 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.

7.5.2.2 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 the Call-up, for each Service.

3. Progress payments, in respect of all fee arrangements, shall be made in accordance with Terms of Payment 7.5.1.2, Payments to the Consultant, but such payments shall not exceed the value of the fee indicated for each Service under consideration.

7.5.2.3 Limitation of Price

SACC Manual clause C6000C (2011-05-16) Limitation of Price

7.5.3 SACC Manual Clauses

SACC Manual clause C0711C (2008-05-12) Time Verification

SACC Manual clause A9117C (2007-11-30) T1204 - Direct Request by Customer Department

7.6 Invoicing Instructions

1. The Consultant must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Each invoice must be supported by:

- a. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
2. Invoices must be distributed as follows:
 - a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

7.7 Insurance Requirements

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

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

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

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ANNEX "A"

DESCRIPTION OF SERVICES

ANNEX "A"

DESCRIPTION OF SERVICES

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A 1 - PROJECT ADMINISTRATION

The following administrative requirements apply during all phases of project delivery and will be stipulated in each Call-up.

A 1.1 Coordination with PWGSC

The Project Manager assigned to the project is the Departmental Representative.

The Project Manager is directly concerned with the project and responsible for its progress.

The Project Manager is the liaison between the Consultant, Public Works and Government Services Canada and the Client Departments.

Public Works and Government Services Canada administers the project and exercises continuing control over the Consultant's work during all phases of development.

Unless directed otherwise by the Project Manager, the Consultant shall obtain all Federal requirements and approvals necessary for the work.

The Consultant shall:

- Carry out services in accordance with approved documents and directions given by the Project Manager.
- Ensure all communications carry the PWGSC's Project Title, Project Number and File Number.
- Advise the Project Manager of any changes that may affect schedule or budget or are inconsistent with instructions or written approvals previously given.
- Detail the extent and reasons for the changes and obtain written approval before proceeding.

A 1.2 Coordination with Sub-Consultants

The Consultant shall:

- Throughout all stages of the Project, coordinate and assume responsibility for the work of any Sub-Consultants and specialists retained by the Consultant.
- Ensure clear, accurate and ongoing communication of concept, budget, and scheduling issues (including changes) as they relate to the responsibilities of all sub-consultants and specialists from initial base building reviews to post construction reports.
- Ensure Sub-Consultants provide adequate inspection services and attend all required meetings.

A 1.3 General Project Deliverables

Building Condition data and any requested "stand alone" tasks shall be completed as described in the Statement of Work (refer to A 2) and the Terms of Reference (refer to Appendix AA and Appendix AB) and delivered to PWGSC in the prescribed electronic format using the PWGSC file sharing portal OPROMA.

A 1.4 Lines of Communication

Correspond only with the Project Manager, at times and in the manner dictated by the Project Manager.

The consultant shall not communicate with client departments unless so authorized in writing by the Project Manager.

A 1.5 Media

The consultant shall not respond to requests for project related information or questions from the media.

Such inquiries are to be directed to the Project Manager.

A 1.6 Meetings

As and if required, meetings may be arranged during individual call-ups, for all members of project team, including representatives from:

- Client Department.
- Public Works and Government Services Canada.
- Consultant.

The Consultant shall:

- Attend meetings.

- Record issues and decisions.
- Prepare and distribute minutes within 48 hours of the meeting.

A 1.7 Project Response Time

The prime consultant and proposed sub-consultants shall be personally available to attend meetings and respond to inquiries:

- Within one (1) business day of request, from the date of the award of the consultant call-up until delivery of the final documents or files.

A 1.8 Submissions, Reviews and Approvals

For each call-up, work in progress will be reviewed as follows:

- Administrative review of completed draft BCR data.
- Content and Format: reports, studies, audits and other deliverables not in the VFA file.
- Expected Turnaround Time: 4 weeks (calendar)
- Number of Submissions: until approval has been received

A 1.9 Codes, Standards, Policies, Laws, Acts, and Guidelines

Comply with all applicable federal, provincial, regional and municipal requirements, including but not limited to:

CODES

- Canada Labour Code, Part II (CLC), R.S., 1985, c. L-2.
- Canada Occupational Health and Safety Regulations (COHSR), SOR/86-304.
- National Building Code of Canada (NBC).
- Ontario Building Code (OBC).
- National Plumbing Code of Canada (NPC).
- Canadian Electrical Code, Part 1 (CEC).
- Ontario Electrical Safety Code.
- National Fire Code of Canada (NFC).
- Ontario Fire Code (OFC).

POLICES & GUIDELINES

Treasury Board of Canada Secretariat (TBS):

- Accessibility Standard for Real Property.
- Policy on Management of Real Property.
- Federal Identity Program (FIP).
- Occupational Safety and Health Directive:
 - Part IV - Boiler and Pressure Vessels.
 - Part V - Elevating Devices.
- Fire Protection Services - General (Chapter 3-0).
- Standard for Fire Safety Planning and Fire Emergency Organization (Chapter 3-1).
- Fire Protection Standard for Design and Construction (Chapter 3-2).
- Fire Protection Standard for Electronic Data Processing Equipment (Chapter 3-3).
- Fire Alarm Systems Standard (Chapter 3-4).
- Standard for Fire Inspections (Chapter 3-5).

Public Works and Government Services Canada (PWGSC):

- Asset Integrity Directive.
- RPB - Facility Maintenance Policy.
- RPB - Facility Maintenance Guidelines.
- RPB - Seismic Resistance of PWGSC Buildings.
- RPB - MD 15000 Mechanical Environmental Standard for Federal Office Buildings
- DP 058 Electrical Safety.

STANDARDS

Canadian Standards Association (CSA):

- CAN/CSA - B44 Safety Code for Elevators.
- CAN/CSA - B51 Boiler, Pressure Vessel and Pressure Piping Code.
- CAN/CSA - B52 Mechanical Refrigeration Code.
- CAN/CSA - B651 Accessible Design for the Built Environment.
- CAN/CSA - C22.1 Canadian Electrical Code, Part I, Safety Standard for Electrical Installations.
- CAN/CSA - C282 Emergency Electrical Power Supply for Buildings.
- CAN/CSA - Z94.4 Selection, Use and Care of Respirators.

Underwriters Laboratories of Canada (ULC):

- CAN/ULC - S524 Installation of Fire Alarm Systems.
- CAN/ULC - S525 Audible Signal Appliances for Fire Alarm Systems, Including Accessories.
- CAN/ULC - S526 Visual Signal Devices for Fire Alarm Systems, Including Accessories.
- CAN/ULC - S527 Standard for Control Units for Fire Alarm Systems.
- CAN/ULC - S529 Smoke Detectors for Fire Alarm Systems.
- CAN/ULC - S5301 Heat Actuated Fire Detectors for Fire Alarm Systems.
- CAN/ULC - S531 Standard for Smoke Alarms.
- CAN/ULC - S536 Inspection and Testing of Fire Alarm Systems.
- CAN/ULC - S537 Verification of Fire Alarm Systems.
- CAN/ULC - S541 Speakers for Fire Alarm Systems, and Accessories.

National Fire Protection Association (NFPA):

- various.

American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE):

- various.

National Research Council of Canada (NRC):

- Manual for Screening of Buildings for Seismic Evaluation.

Natural Resources Canada (NRCAN):

- Federal Buildings Initiative.

A 1.10 Official Languages

This Standing Offer requires services in the English language.

A 2 STATEMENT OF WORK

A 2.1 Building Condition Reports

A key factor in managing an accommodation program is the cyclical evaluation of the inventory (systems/elements). This is performed in order to determine the most appropriate management strategy for retention, maintenance, and/or retrofit/renewal. Analysis of the inventory is critical to the effective and efficient life-cycle management of the inventory, and a Building Condition Report (BCR) provides the detailed technical information upon which this management strategy is based.

In general, a BCR is an element level assessment of the condition of an asset, and recommended actions required to maintain the asset in operating condition over the next 30 years. The BCR covers all systems on the site and building(s) of the asset, organized as follows:

- Site related elements.
- Architectural related elements.
- Structural elements.
- Horizontal and vertical transportation.
- Mechanical elements
- Electrical elements.

The objective of a Building Condition Report is to investigate various site and building factors at the system level, including:

- Element condition.
- Assessment of remaining life.
- Equipment obsolescence.
- Design problems and deficiencies that adversely affect operation and maintenance activities.
- Compliance with the latest edition/revision of applicable codes, standards, policies, directives, etc.

The statement of work, specific to a call-up against the standing offer, will detail the extent of work required and indicate restrictions, if any, that require incorporation into the 30 year plan. The level of effort required could be as small as one of the "stand alone" tasks up to and including investigations required for a particular BCR.

Perform on-site inspection and completion of a Building Condition Report in the prescribed format and in accordance with the terms of reference:

- Appendix AA – Terms of Reference for VFA Reports.
- Appendix AB – Terms of Reference for Paper-Based Reports.

NOTE: Sample Building Condition Reports (PDF format) will be made available upon request.

A 2.2 Stand Alone Task

Completion of various stand alone tasks may be included as part of a Standing Offer call-up.

The SOW, specific to a call-up against the standing offer, will detail the extent of work required and indicate any requirement restrictions

A 2.2.1 Ad Hoc Study

Completion of an ad hoc study may be included as part of a Standing Offer call-up.

An ad hoc study is a specialized technical review which requires in-depth analysis and/or destructive testing, which is undertaken to address specific deficiencies or recommendations identified in, but beyond the scope of the BCR.

It typically covers specialized issues such as occupant environmental complaints or energy audits. It may also be called for as part of a broader feasibility study related to key investment decisions, such as a major renovation, acquisition, or disposal.

Ad hoc studies are performed by technical specialists, could involve one or more disciplines. The selection could be part of these series of building and site improvement factors including but not limited to:

- Assessment of specific building systems in any building category:
 - Building envelopes to include all types of cladding and roof assemblies.
 - Seismic screenings and assessments.
 - Thermography.
 - Energy Audits.
 - Fire Alarms Systems.
 - Fire Protection to include suppression, emergency lighting and extinguishers.
 - Mould Inspections.
 - Asbestos verifications.
 - Accessibility under Federal Barrier Free standards.
- Assessment of Special Purpose Areas in any building category:
 - Generator Rooms.

-
- Major Mechanical and Electrical equipment rooms (heating/cooling).
 - Elevator Machine Rooms.
 - Boiler Rooms.
 - Pump and Sprinkler Rooms.
 - Transformer Vaults.
 - Assessment of Specialty Structures:
 - Air Supported Structures.
 - Parking Structures.
 - Retaining Wall Structures.
 - Structures covering Public Spaces.
 - Anchor Systems on Bldg. Exteriors.
 - Storage Tanks (excluding fuel).
 - Assessment of Landscape Features.
 - Fences and Gates.
 - Sculpture.
 - Outdoor Paving.
 - Assessment of Environmental Features:
 - Fuel tank storage assessed in conjunction with a Federal protocol by the PWGSC Environmental Services.
 - Storm drainage solutions.
 - Retention ponds & cooling structures.
 - Sub-surface drainage, culverts and ditches.
 - Specific types of analyses:
 - Development of alternative solutions rated through risk and cost/benefit analyses.
 - Recommendation of solutions to provide immediate relief and long term asset integrity.
 - Development of costed projects, broken down to the System level and including the same narrative and detail data described in Appendices "AA" and "AB".

Since ad hoc studies will vary in scope depending on the topic, a schedule of costs is requested which itemizes the level of personnel required to carry-out this kind of work and their hourly rate.

A 2.2.2 Accessibility Audit

Completion of an Accessibility Audit may be included as part of a Standing Offer call-up.

An accessibility audit is a detailed technical assessment carried-out to determine an asset's level of compliance in accordance with the requirements dictated by Treasury Boards 'Accessibility Standard for Real Property' (effective Nov. 01, 2006) and its designated technical standard (CAN/CSA-B651 Accessible Design for the Built Environment).

It is necessary to conduct on-going periodic reviews to:

- Enable PWGSC to monitor and report on the level of compliance through the Accessibility Module of the Real Property Management System (RPMS).
- Address ongoing changes/revisions to applicable legislation and internal policies.
- Identify corrective actions required to maintain the mandated level of accessibility in Federal Crown facilities.

An Accessibility Audit includes completion of:

- Accessibility Audit Checklists (identifying non-conforming conditions only) – MS Excel format.
- Accessibility Audit Cost Estimate - MS Excel format.
- Accessibility Audit Report - MS Word format.

END OF ANNEX "A" – DESCRIPTION OF SERVICES

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PWL-5-38148

Id de l'acheteur - Buyer ID
pw1035
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APPENDIX “AA”

TERMS OF REFERENCE FOR VFA BUILDING CONDITION REPORTS

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AA 1 - BACKGROUND

PWGSC, as the service agency responsible for allocating accommodation to its tenant departments, is accountable for effectively acquiring and efficiently managing this accommodation program.

In addressing this mandate, PWGSC undertakes a series of cyclical evaluations in order to determine the most appropriate management strategy for the retention, maintenance and/ or retrofit/ renewal of these facilities in order to satisfy current and future client requirements.

In view of the age of the PWGSC building inventory and given the significant investments required to re-capitalize these assets, the importance of a rigorous analysis of the inventory through the preparation of Asset Management Plans (AMP), a financial analysis, is critical to the effective and efficient life-cycle management of this inventory.

Building Condition Reports (BCR's) provide the detailed technical information on which the AMPs are based. While the condition of the majority of PWGSC assets has been assessed in the past, the data in the BCRs and subsequently, the analysis AMPs must be updated every five years to ensure their accuracy and to provide best support possible to managers making capital and repair investment decisions.

AA 2 – VFA APPROACH

Prior to 2002 PWGSC BCR's were always delivered as a paper-based report. While this approach worked reasonably well for single assets, performing an analysis to determine the overall condition of the portfolio was an arduous task.

In 2002, PWGSC purchased an off-the-shelf database application to hold and summarize building condition information. This application, with the trade name "ReCAPP", was configured for use with existing business processes and named "Capital Asset Planning System" (CAPS) for use within the PWGSC environment.

In 2014 CAPS was sold and replaced with an application suite known as VFA. VFA, which is expected to increase the usefulness and standardization of building condition data, will be populated with all existing BCR data.

Asset BCRs are kept current as yearly inflation updates to project costs and project completion information is entered. System generated reports permit the planning of projects at the portfolio level with the potential for cost savings by taking advantage of the economies of scale.

AA 3 - VFA SURVEYS

BCR data will now be captured using VFA Surveys in place of the CAPS Asset Validation Survey (AVS) Tool. VFA Surveys use a preconfigured Internet-based BCR Survey to capture building condition information in the field via mobile devices or on desktop computers. This survey contains all the current BCR and annual Building Performance Review (BPR) data.

To access the VFA Survey, the user enters a custom URL into either a mobile device or desktop browser. User assigned surveys can then be "checked-out" to the desired medium, completed offline, "checked-in", and then submitted for approval". A designated "approver" is automatically notified that a survey awaits their attention. Following the approval, the asset will be updated with the BCR survey data. In the case of a rejected survey, the assessor will be automatically notified with details of the areas that require corrective action. The cycle will continue until the survey approver accepts the survey. The National Centre of Expertise (NCOE) will selectively audit approved surveys in the VFA application to validate administrative completeness.

Training on the use of VFA Surveys for Standing Offer consultants, will be provided, by PWGSC, if and when required.

AA 1.4 GENERAL BCR REQUIREMENTS

In general, a BCR is a visual assessment of the condition of the systems and recommended actions required to maintain the asset in operating condition during a projected 30-year window. The BCR covers all systems on-site and in the asset, organized as follows:

- A – Substructure
- B – Shell
- C – Interiors
- D – Services
- E – Equipment and Furnishings
- F – Special Construction and Demolition
- G – Building Sitework

The intent of the BCR is to identify the requirements required to bring an asset to a BOMA Class-B level of accommodation and to maintain that level throughout a 30-year planning horizon. If an asset is at the BOMA Class-A level of accommodation then the level to be maintained during the 30-year planning horizon is Class-A (BOMA definition). The concept of full life-cycle costing for the facility is the basis for the development of the long-term capital plan. The 30-year capital plan should indicate the optimal timing/grouping of recommended requirements in order to minimize overall cost and tenant disruption.

AA 1.4.1 Thirty-Year Window of Capital and Repair Requirements

Since the PWGSC BCR data is kept up to date through yearly data entry, the 25-year horizon would only be valid for one year. The number of years of valid planning data available reduces by one year for every year since the last BCR. To ensure PWGSC continues to have valid 25-year forecasts of requirement costs during the five years between BCR's, PWGSC requires a 30-year planning horizon.

AA 1.4.2 System List

VFA uses Uniformat II, Level-3 as determined by the American Society for Testing and Materials (ASTM) to define the list of available building systems. These systems establish the level of detail required for a BCR. Once chosen for a particular asset, each system is included in the VFA Survey. System data, including lifetime and projected costs to maintain building condition, are associated with the relevant system.

AA 1.4.3 Validation of the System List

The VFA Survey for any asset contains a system list specific to its building and site improvements. To ensure the BCR will cover the entire asset, the first task in writing a BCR shall be to validate the existing system list. The existence of each system in the list shall be confirmed by visual confirmation at the building and site. Use the master system list in VFA Survey as a guide to establishing the granularity to which the building will be broken down. Systems in this list, but not found in the building shall be deleted. Misclassifications (e.g. B1021 Flat Roof Construction instead of B1022 Pitched Roof Construction) shall be reclassified correctly. Systems in the building but missing from the building system list shall be added.

AA 1.4.3.1 Inventory Validation: System Creation, Deletion & Modification

Systems are defined by specific properties such as:

- Year Installed.
- Lifetime.

- Remaining Years.
- Unit Cost.
- Quantity.

The assessor will adhere to the following national business rules for modifying the properties of the System inventory, and in turn defining System-Renewal Requirements;

1. VFA automatically creates the first and future System-Renewal Requirements from its related System details (Year Installed, Lifetime, Remaining Years, Unit Cost, and Quantity). An assessor therefore does not create System-Renewal Requirements, but indirectly sets its properties through the details on the System.
2. A System must not have more than one renewal inside the System Lifetime.
3. Where there are multiple systems that are of similar type, capacity, are subject to the same duty cycles, and share the same installation and expected lives, the assessor will treat them as one system, and increment the quantity accordingly.
4. If the system(s) does not meet the above criteria (#3), they must exist as separate systems, and thus will have independent renewals.
5. System-Renewal Requirements are scheduled at the end of the System Lifetime and cannot be split over multiple years. Where a system renewal is expected to exceed one year, it will be deferred until completion.

AA 1.5 SYSTEMS REQUIREMENTS

This section describes the work that the assessor will perform at the system level when producing a BCR.

AA 1.5.2 Required System Photographs

A good photograph is worth a thousand words. To give a better understanding of the asset, the assessor will always include a photograph of the following systems, examples such as:

- G2044 Signage.
- G2020 Parking Lots.
- B2010 Exterior Walls (Typically a photo of each elevation).
- B30 Roofing (Typically a photo of each type of roof and roofing material used).
- D3021 Boilers.
- D3045 Chilled Water Distribution.
- D3091 Special Cooling Systems & Devices.
- D3060 Controls & Instrumentation.
- D2023 Domestic Water Supply Equipment.
- D5010 Electrical Service & Distribution.
- Primary Switch Gear.
- Primary Transformer & Vault.
- Secondary Service Electrical.
- Secondary Switchgear.
- Secondary Transformer.
- Distribution Panels.
- D5021 Branch Wiring Devices (typical, not one of each).
- D5022 Lighting Equipment (typical, not one of each).
- Cafeteria (link these photos to the asset).
- Lobby – all four sides, ceiling and floor (link these photos to the asset).
- Washrooms (typical, not one of each) (link these photos to the asset).

These photograph files, as well as those specified elsewhere in this document (see AA 1.6.3 and AA 1.7.2), must be:

- .JPG or .JPEG files.
- Less than 2 MB.

VFA Auditor includes advanced Photo Management functionality allowing users to link multiple photos to an Asset, System, and Requirements. Users have the option to link photos directly from a mobile device camera (iPad only at this time) or select from a camera roll or photo folder. Position the subject matter in the photo as such that it is close enough to clearly present the required details of the component and the issue, if any, yet show surrounding detail so that the photo location can be confirmed.

AA 1.5.3 System Details

Mandatory system details that shall be reviewed and updated as necessary are:

- System Name
- Year Installed
- Lifetime
- Years Remaining
- Condition Rating
- Quantity
- Replacement Cost

The definition and requirements for each field are found in clauses AA 1.5.3.1 to AA 1.5.3.7, below.

AA 1.5.3.1 System Name

When completing a VFA Survey, the default system name is the same as the system's name in the master system list (e.g. B1015 Exterior Stairs & Fire Escapes). To help position the system within the building, its location shall be appended to the default name. For example, if there were two different sets of Exterior Stairs used on a building then the assessor will adjust the name accordingly such as "B1015 Exterior Stairs & Fire Escapes - A-Wing". This will not be required where a system isn't found in more than one location or the systems share the same expected lifetimes and core details. In that case, the assessor will simply set the quantity and make note of system locations and details in the system description.

AA 1.5.3.2 Year Installed

The Year Installed for a system is the last year the system was replaced or renovated to the point where its lifetime is now as long as if it were new. The assessor will update this field for each system in the asset as part of the BCR. VFA will automatically populate the Age field based on the construction year of the asset. If the Year Installed is not known, then it shall be determined by subtracting the lifetime for that system from the year the next replacement or renewal renovation is recommended. If the system has never been replaced, the assessor will accept the Year Constructed as the Year Installed for that system.

AA 1.5.3.3 Lifetime

Lifetime is an estimate of the number of years a system will last, from brand new, before it must be replaced. In the VFA Survey, the default lifetime may be accepted, or modified based on the nature of the particular component.

AA 1.5.3.4 Years Remaining

A System's default condition is based on its age (System's Year Installed vs. Lifetime). The VFA Survey allows the assessor to accept the Years Remaining based on age or to enter a different value based on observed condition.

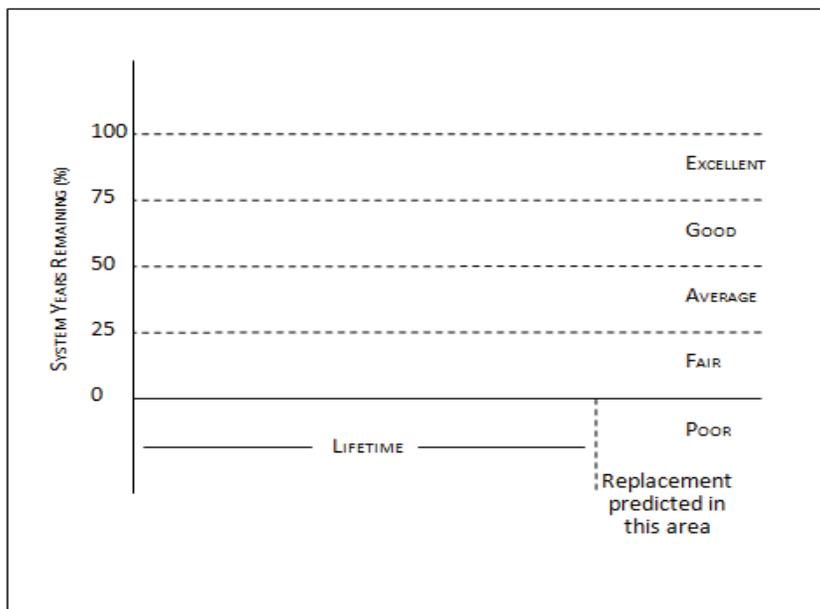
AA 1.5.3.5 Condition Rating

The first step in establishing the condition of a system is to decide on a system's remaining life. The remaining life shall be determined by considering the following factors:

- Year Installed.
- Lifetime.
- Deficiencies.
- Quantity.
- Service conditions including duty cycles, weather conditions, hours of operation.
- Maintenance practices.
- Obsolescence.
- Operational or functional performance problems.

Then, as a result of the inspection process the condition of each system shall be determined as "excellent", "good", "average", "fair" or "poor". For purposes of consistency, each of these five possible conditions is related to the remaining life of a system divided by its lifetime and expressed as a percentage. The following chart can illustrate how this works.

NOTE: Percentages at the boundaries between two conditions shall link to the condition below the boundary. (e.g. 50% of life remaining would imply average condition).



Finally, the expected or theoretical life of every system shall be established as part of the inspection process. For convenience the lifetime of every system in VFA has been determined. If the assessor feels that, under the circumstances in which the system is being used, this lifetime is too high or too low, the lifetime shall be modified to suit the situation.

AA 1.5.3.6 Quantity

The Quantity of each system shall be determined for replacement cost estimating purposes. Distance, area and volume measurements shall be measured using the metric system. These values are required to calculate system replacement costs.

AA 1.5.3.7 Replacement Cost

The Replacement Cost of each system shall be automatically populated in the survey based on its Quantity and Unit Cost. If this cost is inaccurate, an Adjustment Factor is available to the assessor to modify.

AA 1.5.4 System Description

There is one system level description field associated with each system. If a narrative already exists, then it shall be reviewed and modified to reflect the current situation. This description field has a character limitation of 4,000 characters therefore narratives should be brief, concise and current to reflect BCR assessment.

AA 1.5.4.1 Description

Provide a DESCRIPTION of the system, including:

- Basic description (i.e. make/model)
- Location of the element in relation to the asset.
- The quality of the element (above average, average, below average).

Provide an overview of the CONDITION of the system, including:

- General description of the elements overall condition and performance (use one of: "excellent", "good", "average", "fair", "poor") and the rationale.
- Any notable exceptions in condition and/or performance (use one of: "excellent", "good", "average", "fair", "poor", "not assessed") and the rationale.
- Description of impact on the remaining life of the element from identified issues with its condition and/or service conditions, including: severe environment, below average quality element, inappropriate element or system design, no longer supported by manufacturer/supplier, inadequate maintenance, inadequate performance, damage from external sources, etc.).

Provide an overview of the REMAINING LIFE and anticipated REPLACEMENT of the system, including:

- Year the system was new (original construction or last replacement or refurbishment).
- Description of impact on the remaining life of the system from identified issues with its condition and/or service conditions, including: severe environment, below average quality element, inappropriate element or system design, no longer supported by manufacturer/supplier, inadequate maintenance, inadequate performance, damage from external sources, etc.).
- Year of anticipated replacement or refurbishment of the system.

AA 1.5.4.2 BPR Description & BPR Rating

This narrative is not to be modified by the BCR assessor. Systems deemed operationally unsatisfactory by the BPR team are assigned a "Component BPR Rating" of "Unsatisfactory". In each case the BPR assessor will have described the reasons why in this description field. The assessor will review this narrative for each "Unsatisfactory" system and recommend and cost a course of action to rectify the problem described in the form of a Requirement. Discussions with the property management team shall be held to ensure the assessor fully understands the problem described for each "Unsatisfactory" system.

NOTE: This field can also hold valuable information from the BPR, even if the system status is "Satisfactory".

AA 1.6 REQUIREMENT DATA REQUIREMENTS

Once the process of evaluating a system's condition has been completed, the recommended repair requirements shall be entered into (or modify existing requirements) in the VFA Survey. A "Requirement" is the name given to a recommended action to repair or replace a system. In a BCR, requirements shall

be classified by type so that various building performance metrics can be calculated and the status of government programs can be ascertained. Requirements are typically grouped together into projects that will be integrated into the AMPs strategic priorities, and implemented once funding is secured.

BCR Requirements, typically apply to "replacement" or "repair" activities over \$5,000. However, Requirements under \$5,000 may still be considered valid, as long as they do not apply to maintenance activities (i.e. changing oil or replacing filter).

Renewal Requirements are automatically generated by VFA.facility to represent the cost and action date of a System's renewal event. The cost and date are read-only and are automatically populated by the System's Replacement Cost and the date is set from the System's Years Remaining. The assessor therefore will not directly update Renewal Requirement details. However, adjusting the System details Lifetime, Year Installed, and Years Remaining will affect the Renewal Requirement details once the survey is integrated into VFA.facility. Additionally, future Renewal Requirements are automatically cycled and recreated based on the System Lifetime.

AA 1.6.1 Requirement Category

In VFA each requirement must be categorized into a pre-defined structure that indicates the general issue. A requirement shall always be classified at the lowest level of this structure. Requirement categorization facilitates reporting on various government programs, and to help determine asset performance in those areas. The justification for recommending each requirement shall be used to determine its classification. In addition, requirements are identified as either Capital or Repair.

AA 1.6.1.1 Capital versus Repair

The criteria for determining whether a requirement is Capital or Repair are based on the rules for accrual accounting. Before assigning an event as CAPITAL:

- The cost must be greater than \$25k, and;
- One or more of the following rules must apply - Does the Requirement:
 - Provide an increase in quality over original ? The work is being done solely for the purpose of improving the functioning of the asset. If however the work is being done due to the poor condition of the system and the replacement is inherently more functional or of higher quality due to being newer, then the event is a Repair Requirement.
 - Improve operating efficiency ? The work is being done solely for the purpose of improving the operating efficiency of the asset. If, however, the work is being done due to the poor condition of the system and the replacement is inherently more operationally efficient, then the event is a Repair Requirement.
 - Add a new item, system or function to the asset ? Adding accessibility capability such as door openers to an asset that does not have them would be considered a Capital Requirement, but replacing existing door openers that are in poor condition would be a Repair Requirement.
 - Increase the area of the building ? Adding a new wing or floor to the asset.

Modifications, Upgrades, Refits, Optimize, Refurbish, Aesthetics, etc. These words do not automatically denote a Capital project, but here are some rules to act as a guide:

- If the optimizations, upgrade, etc. are being performed on a technology-related system (certain electrical systems, DDC Controls, Elevator controls, etc.) the replacement event is probably an improvement in quality over the original as opposed to a replacement due to physical condition and should therefore be classed as Capital. If an element is being replaced for any reason other than poor condition or obsolescence, its associated event should be classified as Capital.
- Most Lobby refurbishments/refits are for aesthetic purposes. These requirements normally occur before the end of the typical service life of most lobbies finishes, as there is a need to keep the 'street-appearance' of the asset fresh and new. These requirements should be classed as Capital.

Otherwise the event should be classified as a REPAIR:

AA 1.6.1.2 Requirement Structure

The VFA Requirement subclasses are the same for both Capital and Repair. The Requirement classification chosen shall reflect its primary justification (e.g. if the purpose of requirement is to remove asbestos, then the Regulatory HazMat classification would be used, if the purpose of the requirement is to repair a system, then the Integrity-Reliability classification would be used). Examples to aid in classification are provided below within the structure:

The requirement structure is:

- Integrity
 - Lifecycle - Systems that are approaching or have exceeded their useful life (e.g. a 25-year old chiller that is approaching the end of its useful life and is recommended to be replaced within the next 5 years; a 15 year old membrane roof that is prematurely aged and showing signs of wear and leaking).
 - Reliability - Systems that are not working as designed and/or cannot be depended upon, but have not yet exceeded their useful life (e.g. a recently installed mechanical control that is not operating properly or functioning in an unpredictable manner; breaches in the roof membrane or deteriorated window sealants).
- Optimization
 - Abandoned - Systems that have been abandoned in place (e.g. old cooling tower abandoned on the roof; old oil storage tank abandoned in the basement).
 - Capacity - Problems with a System's ability to meet current demand (e.g. heating equipment that cannot adequately cover its intended area).
 - Energy - Conditions that adversely affect energy use (e.g. single-pane windows, lack of pipe insulation).
 - Maintenance - Systems that require routine maintenance (e.g. recalibration of thermostats, cleaning of ducts, cyclical painting, other aesthetic considerations).
 - Mission - Systems that do not meet the critical standards of the organization, as per guidelines provided by the client (e.g. a facility needs to be operational on a 24/7 basis, therefore redundancy/backup components need to be added; required additions/alterations associated with the conversion of a classroom facility into a dormitory; client driven security vulnerabilities).
 - Sustainability - Improvements where Systems potentially have a sustainable opportunity, other than Energy based (e.g. water conservation measures; use of building materials and resources based on sustainable procurement and with recycled/bio-based content; improvement of indoor environmental quality and considerations that reduce the impact of the building and its operations on the surrounding site).
 - Technological Improvements - Conditions that need to be made modern to meet current technological standards (e.g. pneumatic to DDC; non-energy based upgrades).
- Regulatory
 - Accessibility - Conditions that violate accessibility guidelines (e.g. non-accessible building entrances, plumbing fixtures, or door hardware).
 - Building Code - Conditions that violate applicable federal, provincial, regional and municipal regulatory requirements (e.g. lack of backflow protection, insufficient ventilation).

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PWL-5-38148

Id de l'acheteur - Buyer ID
pwl035
N° CCC / CCC No./ N° VME - FMS

- HazMat - Regulatory issues associated with Asbestos, Lead, PCB, and other situations in which hazardous materials are known or suspected to be present in the Asset (e.g. suspected asbestos pipe insulation or floor tiles).
- Life Safety - Conditions that pose an immediate danger to human life or safety (e.g. blocked emergency egress, dead-end corridors, damaged and/or non-functional fire protection or emergency Systems).

The majority of requirements are usually classified in "Integrity" and a sub classification of Reliability or Lifecycle.

1.6.2 Required Requirement Photographs

In addition to the photographs required under section AA 1.5.2, a photo shall be included if:

- There is visual evidence of damage or wear.
- There is a visually evident health or safety risk.
- There is a visually evident code or directive compliance issue.
- The photograph will help explain the requirement implementation strategy.
- Visual evidence is required to explain the requirement implementation strategy.

AA 1.6.3 Requirement Details

The requirement details listed below shall be validated and entered or updated in the VFA Survey for every new or existing requirement.

AA 1.6.3.1 Name

This name field is used in spreadsheet reports and shall identify the system affected by the issue, provide a brief description, preferably no more than 40 characters, akin to a project title (e.g. roof replacement, boiler refurbishment, fire separation upgrades). This field should be used to identify any potential code or Health and Safety considerations.

AA 1.6.3.2 Priority, Recommended Action Date & Inspection Date

Each non-renewal Requirement must be assigned a Priority that indicates its severity. Its value will automatically populate the "Recommended Action Date" in VFA.facility. Renewal Requirement priorities are set as read-only, and are automatically assigned based on their parent system's remaining life.

Each priority value is defined by the years offset up to a value of 20-years. Beyond that, the assessor will select "Outside Planning Window". For example, a priority value of 3 will set the Recommended Action Date to three years from the "Inspection Date". Inspection Date is a read-only field that is automatically populated when a Requirement is created or modified.

AA 1.6.3.3 Unit Cost, Units & Quantity

The Unit Cost of a Renewal Requirement is a read-only field set by the Quantity and Unit Cost set in its parent System. For existing Requirements the Estimated Cost is also read-only. If the assessor deems this value to be inaccurate, the Requirement Adjustment Factor (%) can be adjusted accordingly.

For new Requirements the assessor will enter the Quantity, Units and Unit Cost. The Estimated Cost is read-only and will automatically populate based on the multiplication of the Quantity and Unit Cost. The Estimated Cost shall meet Class-D accuracy, in current-year dollars. Cost estimates for requirements shall be determined using a commercially available cost-estimating tool (not provided).

The assessor will ensure the cost estimate:

- Is location specific.
- Includes a construction contingency equal to 15% of the base costs.
- Includes an amount to cover project soft costs/fees of 30%.

AA 1.6.4 Requirement Descriptions

There is one description field associated with each Requirement as detailed below along with a description of their required content.

AA 1.6.4.1 Description

The following information shall be included in every Requirement description:

- A full description of what is to be done;
- The expected results;
- The justification and strategy, including the following details;
 - Rational for why the event is required.
 - List of what deficiency(ies) is the event correcting or enhancement is it providing.
 - Indicate any potential for cost savings, increased performance, changes in function, reduction in energy consumption, greater code compliance, and increased accessibility.
 - How the event should be carried out / steps required.
 - Indicate if it would be better to wait for a particular time of year.
 - Identify potential tenant disruptions.
 - Describe the precautions that should be adhered to, to minimize impact on the tenant and building operations.
 - List other requirements that should be grouped with this event and implemented together.

AA 1.6.4.2 Implication of Requirement Deferral

The answers to the following questions shall be included in the description field:

- What will be the impact on asset operations if the event is delayed ?
- Will there be any additional degradation (cost) if the event is delayed ?
- What is the potential impact of other systems if the event is delayed ?
- What is the impact on the tenant's health and working environment if the event is delayed ?
- What is the impact on other related requirements/projects ?

AA 1.6.5 Closing a Completed Requirement

The assessor is to "Close" Requirements that are 100% complete. When reviewing an overdue/deferred Requirement, it is imperative that the assessor does not close it unless the issue has been 100% completed and resolved. In the case of overdue/deferred Requirements where the details are inaccurate, the assessor shall modify the details. Deleting an overdue/deferred Requirement and creating a new one skews FCI and related calculations resulting in a false picture of asset condition. The assessor can split a requirement to show that 30% of the requirement has been completed thus leaving 70% open.

AA 1.7 ASSET DATA REQUIREMENTS

The asset data requirements for a BCR are described in this section.

AA 1.7.1 Asset Details

There is only one asset detail to be filled in; "Date of Most Recent Assessment". The date the BCR will be completed shall be entered into this field.

AA 1.7.2 Asset Photographs

The assessor will include a recent photograph of the front of the building and a description, including building name and location.

Refer to AA 1.5.2 for photograph specifications.

1.7.3 Asset Narratives

Note that all VFA narrative fields are limited to 4,000 characters, which equates to around one page of text. In cases where existing narratives exceed this limitation, the content will be truncated; however its full content will be available in a document attached to the asset for first time review and update in VFA.

All narrative fields must be updated when updating a BCR in VFA.

AA 1.7.3.1 BCR Project Team and Documents

Include the following information:

- Brief introduction identifying initiation details and requested scope.
- List of participants (inspection team members, asset staff, others), including: name, discipline, company, date of site visit.
- Limitations on liability.
- List of documents reviewed.
- List of drawings reviewed.
- List of other information reviewed.
- List of reference documents (codes, polices, standards, etc.).

AA 1.7.3.2 Building History

Include the following information:

- Original design information, including facility type/use, size (storeys/levels), date and designer.
- Original construction information, including completion date, contractor, and supervision.
- Subsequent addition(s) information, including dates, type/use, size (storeys/levels), designer, contractor, supervision, and date(s).
- Major alteration/renovation information, including dates and brief scope(s).
- Changes in the facility use and/or occupancy.
- Heritage status.

AA 1.7.3.3 BCR Executive Summary

Include the following information:

- A brief summary of the asset, including: municipal address, name (if applicable), current use, and heritage status.
- A brief summary of the building, including: location/orientation on the site, number of storeys above grade, other storeys (i.e. below grade and/or rooftop penthouses), construction (frame and exterior walls), and gross floor area.
- A brief summary of the site, including: size, surrounding features (streets, development, etc.), paved vehicle areas, and other significant site improvements.
- List of Federal tenants.
- List of private sector and 3rd party tenants.
- Custodial department.
- Property management provider(s).
- An overall assessment of the condition of the asset and provide an estimate of its remaining service life.

AA 1.7.3.4 Design Parameters & Deficiencies – current & future

Review and modify as necessary preamble for design/performance – provided.

If a Functionality/Serviceability assessment has been carried out since the last BCR was completed:

- Review the identified serviceability issues.
- Provide under this heading in the VFA Survey a written overview describing the issues reviewed and the recommended corrective actions.
- Create and enter Requirements into the BCR Survey for each recommended corrective action.

If a Functionality/Serviceability Assessment has not been completed, elements that received an unsatisfactory rating during the last BPR shall be considered as the source of serviceability issues:

- Review the identified serviceability issues for each unsatisfactory element.
- Provide under this heading in the BCR Survey a written overview describing the issues reviewed and the recommended corrective actions.
- Create and enter Requirements into the VFA Survey for each recommended corrective action.

See AA 1.7.3.17 Building Performance Review for instructions on how to process the information provided and what to add to this narrative field.

For the parameters listed below, the assessor will compare the maximum capacities against those required for the current workstation density, and any workstation density proposed for the future and make recommendations to overcome any physical or code limiting factors (excluding floor area). If a workstation density for the future is not provided, use the maximum number possible. The maximum possible number of workstations can be calculated by dividing the usable area of the building by the target area allowed per workstation, as per the PWGSC Workplace 2.0 fit-up standard.

The parameters are:

Maximum floor loading;

- Maximum heating capacity;
- Maximum cooling capacity;
- Maximum electrical capacity;
- Elevator capacities;
- Washroom capacities;
- Emergency exit stairwell size.

AA 1.7.3.5 Overview of Architectural & Structure Condition

Provide overviews of the condition and recommendations for the various architectural systems (substructure, shell, interiors, and equipment and fittings), including for each:

- General description.
- General overall condition and performance.
- Any notable exceptions in condition and/or performance.
- Any significant (high cost, health/safety, etc.) elements identified for correction in the short-term.
- General long-term outlook.

AA 1.7.3.6 Overview Site Condition

Provide overviews of the condition and recommendations for the various site systems (site elements, landscaping, and pavements), including for each:

- General description.
- General overall condition and performance.
- Any notable exceptions in condition and/or performance.
- Any significant (high cost, health/safety, etc.) elements identified for correction in the short-term.
- General long-term outlook.

AA 1.7.3.7 Overview of Vertical & Horizontal Transportation Condition

Provide an overview of the condition and recommendations for the vertical/horizon transportation systems, including:

- General description.
- General overall condition and performance.
- Any notable exceptions in condition and/or performance.
- Any significant (high cost, health/safety, etc.) elements identified for correction in the short-term.
- General long-term outlook.

AA 1.7.3.8 Overview of Mechanical Systems Condition

Provide an overview of the condition and recommendations for the mechanical systems, including:

- General description.
- General overall condition and performance.
- Any notable exceptions in condition and/or performance.
- Any significant (high cost, health/safety, etc.) elements identified for correction in the short-term.
- General long-term outlook.

AA 1.7.3.9 Overview of Electrical Systems Condition

Provide an overview of the condition and recommendations for the electrical systems, including:

- General description.
- General overall condition and performance.
- Any notable exceptions in condition and/or performance.
- Any significant (high cost, health/safety, etc.) elements identified for correction in the short-term.
- General long-term outlook.

AA 1.7.3.10 Compliance with Air Quality Targets

Provide an overview of the indoor air quality in regard to the "TBS Occupational Health and Safety Directive, Appendix A – Temperature and Humidity Targets" and "RPB Standard MD 15000 Mechanical Environmental Standard for Federal Office Buildings, Appendix B – Indoor Air Quality, including:

- Preamble for IAQ – provided.
- Identification of any previously completed IAQ assessment.
- Identification of any previously identified IAQ issues.
- Recommendations for action if necessary - create and enter Requirements into the VFA Survey for any recommended corrective action.

AA 1.7.3.11 Regulatory Testing Confirmation

Provide an overview of the on-site regulatory testing and inspection, including:

- Preamble for regulatory testing and inspection – provided.
- List of regulatory testing and inspection records found and reviewed on-site.
- List of regulatory testing and inspection records not found on-site, and reason why.
- List of regulatory testing and inspection not performed, and reason why.
- Recommendations for remedial action if necessary and the reasons for omission.

AA 1.7.3.12 Compliance with Accessibility Standards

Provide an overview of the status and level of accessibility, including:

- Preamble for accessibility in Federal Crown property – provided.
- Compliance levels as determined in the most recently completed accessibility audit.
- List of identified areas of non-compliance.
- List of any recorded exemptions.

-
- List of any upgrades to accessibility implemented since completion of the last audit.
 - Recommendations for remedial action if necessary - create and enter events into the VFA Survey for each recommended corrective action.

AA 1.7.3.13 Overview of Seismic Screening

Provide an overview of the seismic status, including:

- Preamble for seismic resistance in PWGSC buildings – provided.
- Identification of any previously completed seismic assessment (initial screening and/or subsequent evaluation).
- Identification of the subject area and its seismic rating.
- Recommendations for action if necessary - create and enter events into the VFA Survey for any recommended corrective action.

AA 1.7.3.14 Overview of Environmental Issues

Provide an overview of the status of environmental issues, including:

- Preamble for environmental issues – provided.
- Identification of any previously completed environmental assessment.
- Identification of any suspect materials/equipment visually identified on-site.
- Recommendations for action if necessary.

AA 1.7.3.15 Overview of Project Grouping

Include the Strategic Planning disclaimer - provided.

AA 1.7.3.16 Code Compliance Summary

Include the following information:

- Code compliance preamble - provided.
- Applicable code version in force at the time of: original construction, any subsequent addition(s)/alteration(s), and any major renovations.
- Applicable code version currently in force and the relevant building code data matrix information, including: building area, building height, storeys below grade, sprinklered, major occupancy(ies), subsidiary occupancy(ies), number of streets, construction type, required fire-resistance ratings, and fire alarm.
- Occupant loads, including: maximum potential occupant load based on occupancy type(s), and current occupant load.
- Adequacy of existing washroom fixtures to serve maximum potential occupant load.
- A listing of all identified code issues, including:
 - Code issues covered under individual Systems.
 - General (multi-system) code design issues not already covered under individual Systems.
 - Code issues identified in the code compliance paragraph of the latest version of the BPR (see AA 1.7.3.17).

Identify for each code issue the applicable reference (i.e. name of code, standard, policy, etc. and its clause, rule, etc.) – e.g. (NBC 3.3.1.17).

Include for each infraction a recommended corrective action in the form of a Requirement entered into the VFA Survey and indicate if addressing the infraction could be delayed due to the age of the building.

AA 1.7.3.17 Building Performance Review

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When completed, the latest BPR will have been entered under this heading in the VFA Survey and each system will have a "Satisfactory" or "Unsatisfactory" rating. The assessor will review the section on tenant satisfaction and discuss any Unsatisfactory ratings with the Property Manager. Systems that have ongoing operational issues are to be assessed and recommendations in the form of requirements made to address these issues shall be added to the BCR Survey.

A summary of the issues and recommendations shall be written in narrative field "Design Parameters & Deficiencies – current & future" (see AA 1.7.3.4).

AA 1.8 SURVET INSPECTION PROCESS

AA 1.8.1 VFA Survey Reports

The VFA suite can generate various types of reports. Three key report types that will be useful to the BCR team are:

- System/Requirement listing – a list of the asset's Systems and associated Requirement information.
- Condition - a condition report, available with or without pictures, giving a complete record of all data and deficiencies entered into the VFA Survey, including all of the asset narratives (printed off at the beginning of the inspection process, this report can also be used by the BCR inspection team to collect the building condition information).
- Technical Listing - a technical component list giving an overview of System condition and the total of all requirements scheduled in any given year for each system.

AA 1.8.2 VFA Surveys

When an assessor uses a single person to enter all the data into the BCR Survey, it includes all disciplines. If each discipline lead is required to enter data, separate discipline specific VFA Surveys can be provided. The assessor can specify which approach they wish to use when requesting a Survey for a building.

AA 1.8.3 Interview with the Asset Management Team

It is the responsibility of the assessor to schedule an interview with the asset management team at the beginning of every building inspection. This meeting will give the assessor an opportunity to validate the asset's system list, confirm the existence of operational problems, collect information about projects that have been completed since the last BCR and schedule escorted access to the building for the BCR team.

During the winter months, systems located outside the asset may not be accessible or visible due to a layer of snow. In these circumstances the assessor may use the condition assessment provided by the property management team to prepare a preliminary schedule of proposed requirements. As part of each call-up, the assessor will return to the asset when weather permits, and confirm the condition of all those systems whose condition could not be assessed during the original visit. The assessor will update the BCR with any changes required to reflect actual system condition. This process shall not delay the delivery of the first version of the BCR.

END OF APPENDIX "AA" – TERMS OF REFERENCE FOR VFA BUILDING CONDITION REPORTS

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APPENDIX “AB”

TERMS OF REFERENCE FOR PAPER- BASED BUILDING CONDITION REPORTS

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AB 1 – BACKGROUND

Effective acquisition and management of an asset requires cyclical evaluation in order to determine the most appropriate management strategy for its retention, maintenance and/ or retrofit/renewal in order to satisfy current and future client requirements.

Building Condition Reports (BCR's) provide the detailed technical information on which management is based.

In general, a BCR is a visual assessment of the condition of the systems and recommended actions required to maintain the asset in operating condition throughout a 30-year planning horizon. The BCR covers all systems on-site and in the asset, organized as follows:

- 0 -Property / Site Systems.
- 1 - Architectural / Structural Systems.
- 2 - Vertical Transportation Systems.
- 3 - Mechanical Systems.
- 4 - Electrical Systems.

AB 2 –PROCESS

AB 2.1 Files

Transfer of electronic data:

- E-mail (file size restrictions).
- PWGSC file sharing portal OPROMA.

Use electronic master templates provided

- Main report (MS Word).
- Photographs (MS Word).
- Expenditure spreadsheets (MS Excel).
- Appendices (MS Word, MS Excel).

Provide complete updated files for review and comment:

- Control copy (PDF format).

Provide final complete updated files with incorporated comments:

- Individual files.
- Control copy (PDF format).

Produce control copies (individual discipline VFA files combined as single file) in accordance with written instructions provided.

AA 2.2 Interview with Asset Management Team

Schedule and conduct an interview with the asset management team at the beginning of every building inspection. This meeting will:

- Assist in validating the asset's element list.
- Confirm the existence of operational problems.
- Collect information about projects that have been completed since the last BCR.
- Schedule escorted access to the building for the BCR team.

AB 2.3 Site Visit

Use a multi-discipline team to:

- Conduct on-site inspection.
- Interview building maintenance staff and client representatives.
- Review and analyze existing information in the form of reports, as-built drawings and manuals

On-site inspection:

- Visual only - no destructive testing.
- Base non-visible construction/equipment details described in the report on review of available documentations.

AB 2.4 Development of Findings

Identify and describe existing building systems, assess their current condition and provide commentary on the need for a maintenance and repair/replacement programme, with related costs and priorities.

The concept of full life cycle costing for the facility is the basis for the development of the long-term capital plan. The 30-year capital plan should indicate the optimal timing of recommended events in order to minimize overall cost and tenant disruption.

It is not intended to 'upgrade' or 'modernize' the building to a higher level to match standards found in newer facilities, except that required system replacements will be to current standards.

- Provide recommendations to ensure that the building systems reach their maximum life expectancy and maintain the required levels of health and safety.
- Recommend further engineering studies where the cause, extent and/or remediation method required for identified deficiencies cannot be determined visually.
- Identify areas where the building does not comply with current code requirements or internal policies. Some of these items are a result of continuing changes to the codes, standards and policies since the original design/construction of the facility.

Maintain consistent terminology throughout report and across multiple disciplines:

- Project title.
- Headers.
- Footers.
- Naming (facility, building, rooms, etc.).

AB 3 - EXECUTIVE SUMMARY

Narratives in the Executive Summary contain overviews of discipline findings and other high-level information. This information is typically written last when completing an assessment, as it must be developed **after** a completed assessment of related building systems and disciplines.

AB 3.1 Introduction

Review and modify as necessary the default introduction narrative to reflect the initiation details and requested scope, including:

- Requester, name and position.
- Consultant, name (and position).
- Facility, name and municipal address.

AB 3.2 Facility Description

Provide a brief overview of the facility, including:

- Facility name.
- Ownership.

- Custodial Department.
- Management details (provider, agreement type, etc.).

Provide a list of each building on site to be evaluated and a brief description of each, including:

- Building name.
- Number of storeys (above and below grade).
- Means of access between storeys.
- Current use(s).

AB 3.4 Regulatory Testing Confirmation

Review and modify as necessary the default regulatory testing and inspection narrative to reflect:

- List of regulatory testing and inspection records found and reviewed on-site.
- List of regulatory testing and inspection records not found on-site, and reason why.
- List of regulatory testing and inspection not performed, and reason why.
- Recommendations for remedial action if necessary.

AB 3.3 Recommended Facility Expenditures

Modify the short-term and long-term facility expenditure statements.

- Figures should reflect totals in expenditure tables (below).

Complete short-term and long-term facility expenditure tables, broken down by site and each individual building.

- Modify building name(s) as necessary.
- Figures should reflect totals in individual building expenditure tables – refer to “AB 5.6 Recommended Building Expenditures”.

AB 4 - GENERAL INFORMATION

AB 4.1 Project Team

Review and modify as necessary the default project team narrative to reflect:

- Date(s) of site visit.
- List of inspection team members (discipline, name, and position).
- List of on-site staff (Department, name, and position).
- List of other key personnel involved in development of the report (function, name, and position).

AB 4.2 Documents

Provide a list of documentation made available for review and used in development of the report, including:

- Reports.
- Drawings.
- Other (site specific websites, etc.).

AB 4.3 Scope

Review and modify as necessary the default scope narrative to reflect:

- Any special instructions identified in the Standing Offer call-up.

AB 4.4 Mandate

Review and modify as necessary the default mandate narrative to reflect:

- Any special instructions identified in the Standing Offer call-up.

AB 4.5 Estimate Costing

Review and modify as necessary the default estimate costing narrative to reflect:

- Any special instructions identified in the Standing Offer call-up.

AB 4.6 Project Grouping (Strategic Planning)

Review and modify as necessary the default project grouping narrative to reflect:

- Any special instructions identified in the Standing Offer call-up.

AB 4.7 Priority of Work

For reference only – use in completion of building expenditure summary spreadsheets (refer to “AB 7 – Summary of Recommended Expenditures”).

AB 4.8 Project Priority System

For reference only – use in completion of building expenditure summary spreadsheets (refer to “AB 7 – Summary of Recommended Expenditures”).

AB 4.9 Definitions

For reference only – use in completion of element condition narratives (refer to “AB 6 – Element Technical Assessment”).

AB 4.10 References

Review and modify as necessary the default list of references to reflect:

- Any default references not applicable (strikethrough and indicate “Not Applicable” in red).
- Any applicable references not already included (add/insert where appropriate).

AB 5 – SUMMARY (Site and Building)

AB 5.1 History

AB 5.1.1 Site

Provide a description of the site, including:

- Previous use(s) of the site prior to its current development.
- Current development (date and original use/occupancy).
- Changes in the site use and/or occupancy.

AB 5.1.2 Buildings

Provide a brief history the building, including:

- Original design information, including building type/use, size (storeys/levels), date and designer.
- Original construction information, including completion date, contractor, and supervision.
- Subsequent addition(s) information, including dates, type/use, size (storeys/levels), designer, contractor, supervision, and date(s).
- Major alteration/renovation information, including dates and brief scope(s).
- Changes in the building use and/or occupancy.

AB 5.2 Description

AB 5.1.1 Site

Provide a description of the site, including:

- Size.
- Surrounding features (streets, development, etc.).
- Location of building(s), paved vehicle areas, and other significant site improvements.

AB 5.1.2 Buildings

Provide a brief description of the building.

- Use same description as used in the facility description - refer to "AB 3.2 Facility Description".

AB 5.3 Classification (buildings only)

Provide building code matrix data applicable to the building, including:

- Code version currently in force.
- Building area.
- Building Height.
- Storeys below grade.
- Sprinklered.
- Major occupancy(ies).
- Subsidiary occupancy(ies).
- Number of streets.
- Construction type.
- Required fire-resistance ratings.
- Fire alarm.

AB 5.4 Condition

Provide a separate overview for each discipline describing the building condition and recommendations, including:

- General overall condition and performance.
- Any notable exceptions in condition and/or performance.
- Any significant (high cost, health/safety, etc.) elements identified for correction in the short-term.
- General long-term outlook.

AB 5.5 Compliance Issues (buildings only)

Review and modify as necessary the default compliance issues narrative (HRSDC disclaimer) to reflect:

- Any special instructions identified in the Standing Offer call-up

AB 5.6 Recommended Building Expenditures (buildings only)

Modify the short-term and long-term building expenditure statements.

- Figures should reflect totals in expenditure tables (below).

Complete short-term and long-term building expenditure tables, broken down by discipline.

- Figures should reflect totals in individual building expenditure spreadsheets – refer to "AB 7 – Summary of Recommended Expenditures".

AB 6 – ELEMENT TECHNICAL ASSESSMENT

An element is a component or piece of an asset. An asset is made up of the sum of its elements.

To ensure consistency, a master list of elements that make up an asset has been established. These elements establish the level of detail required in the BCR. Element data, including projected costs, are associated with the relevant element.

Review and modify as necessary the element level narratives associated with each element listed. These narratives are:

- Description
- Condition
- Recent Repairs/Modifications
- Effective Remaining Life
- Repairs/Recommendations.

Where an element from the master list is not present, identify it as "Not applicable".

AB 6.1 Description

Provide a description of the element, including:

- Basic description (type, make/model, etc.).
- Assembly/details.
- Location in relation to the asset.

AB 6.1 Condition

Provide an overview of the condition of the element, including:

- General description of the elements overall condition and performance (use one of: "good", "fair", or "poor" - refer to "AB 4.9 Definitions") and the rationale.
- Any notable exceptions (identified as bullet points) in condition and/or performance (use one of: "good", "fair", or "poor" - refer to "AB 4.9 Definitions") and the rationale.

AB 6.2 Recent Repairs/Modifications

Provide an overview of any known repairs and/or modifications (e.g. alterations, refurbishment's, partial replacements, etc.) made to the element over the past 10 - 15 years.

AB 6.3 Design Problems/Deficiencies

Provide an overview of any problems/deficiencies identified with the element design (e.g. severe environment, below average quality, inappropriate element or system design, no longer supported by manufacturer/supplier, etc.).

AB 6.4 Effective Remaining Life

Provide an overview of the elements effective remaining life, including:

- Date of installation (actual year if known, or educated guess).
- Theoretical life span (published industry standard).
- Estimated remaining life based on existing condition and assuming normal 'life cycle' maintenance.
- Year of anticipated replacement or refurbishment

AB 6.5 Recommendations

Provide recommendations at the element level, including repairs, refurbishments, and replacements, required to maintain use of the asset at its current level of accommodation throughout a 30 year planning horizon.

Complete a separate recommendation table for each recommended action.

AB 6.5.1 Brief Description

Provide a brief description of the recommendation:

- As short and concise as possible, no more than 20 characters, akin to a project title (e.g. replace roof, repair boiler, etc.).

AB 6.5.1 Action Year

Provide the recommended year of implementation.

AB 6.5.1 Description

Provide a description of the recommended work, including:

- Overview of scope.
- Rational for implementation (end of service life, deficiency correction, etc.).

AB 6.5.1 Estimated Cost

Enter costing into the recommendation table as separate cost lines to substantiate total cost:

- Base Rate (raw construction costs).
- Contingencies (15% of base rate).
- Soft Costs (30%).

Refer to "4.5 Estimate Costing".

In cases of a remote facility, a modified recommendation table including a 'Location Cost Index' figure will be used.

- Individual LCI factors will be provided.

AB 7 – SUMMARY OF RECOMMENDED EXPENDITURES

Complete summary of recommendations in expenditure spreadsheets:

- Separate sheets for site and each building.
- Each building separate by discipline.
- Separate entry for each recommendation.
- Listed in same order in recommendations appear in report.

AB 7.1 System Description

Indicate the system description.

- Same naming as used in master element list.

AB 7.2 Description of Work

Provide a description of the recommended work.

- Use same description as used in the recommendations brief description - refer to "AB 6.5.1 Brief Description".

AB 7.3 Priority of Work

Indicate the recommended priority of work - refer to "AB 4.7 Priority of Work" for choices and their definition.

AB 7.4 Project Priority System

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Indicate the recommended project priority system - refer to "AB 4.8 Project Priority System" for choices and their definition.

AB 7.5 Expenditures (Short and Long Term)

Indicate the recommendation estimated cost.

- In column corresponding to recommended year of implementation – refer to "AB 6.5.1 Action Year".
- Same total amount found in recommendation estimate – refer to "AB 6.5.1 Estimated Cost".

AB 7 – PHOTOGRAPH PAGES

Provide photographs which show:

- Each elevation of the building exterior.
- Visual evidence of damage or wear.
- Visually evident health or safety risk.
- Visually evident compliance issue (code, standard, policy, directive, etc.).
- Any other valid reason for adding a photograph.

Provide a description with each photograph which clearly explains the subject matter.

Photograph specifications:

- JPEG format.
- VGA resolution (640 X 480).
- Landscape format (to avoid distortion within the CAPS application).

Set camera JPEG compression to "basic" or "normal" (16:1 or 8:1 respectively) to achieve lowest possible file size camera can generate.

END OF APPENDIX "AB" – TERMS OF REFERENCE FOR PAPER-BASED BUILDING CONDITION REPORTS

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ANNEX "B"

BASIS OF PAYMENT

ANNEX "B"

BASIS OF PAYMENT

A. HOURLY RATES

The Consultant will be paid firm, all inclusive, hourly rates as follows, for work performed in accordance with the Contract. Goods and Services Tax or Harmonized Sales Tax (GST/HST) is extra, if applicable. The hourly rates identified for all Disciplines will be for the duration of the Standing Offer.

(To be completed upon issuance of Standing Offer).

DISCIPLINE & CATEGORY OF PERSONNEL	FIXED HOURLY RATE
<u>PRIME CONSULTANT</u>	
Partners or Principals of the Firm	\$ 0.00
<u>ARCHITECTURAL</u>	
Senior Architect	\$ 0.00
Intermediate Personnel	\$ 0.00
Junior Personnel	\$ 0.00
Administrative Support	\$ 0.00
<u>STRUCTURAL ENGINEER</u>	
Senior Engineer	\$ 0.00
Intermediate Personnel	\$ 0.00
Junior Personnel	\$ 0.00
Administrative Support	\$ 0.00
<u>CIVIL ENGINEER</u>	
Senior Engineer	\$ 0.00
Intermediate Personnel	\$ 0.00
Junior Personnel	\$ 0.00
Administrative Support	\$ 0.00
<u>VERTICAL TRANSPORTATION SPECIALIST</u>	
Senior Personnel	\$ 0.00
Intermediate Personnel	\$ 0.00
Junior Personnel	\$ 0.00
Administrative Support	\$ 0.00
<u>MECHANICAL ENGINEER</u>	
Senior Engineer	\$ 0.00
Intermediate Personnel	\$ 0.00
Junior Personnel	\$ 0.00
Administrative Support	\$ 0.00

ELECTRICAL ENGINEER

Senior Engineer	\$ 0.00
Intermediate Personnel	\$ 0.00
Junior Personnel	\$ 0.00
Administrative Support	\$ 0.00

B. DISBURSEMENTS

1. The following disbursements reasonably incurred by the Consultant, that are related to the Services and approved by the Departmental Representative, shall be reimbursed to the Consultant at actual cost:

- (a) reproduction and delivery costs of drawings, CADD files, specifications and other *Technical Documentation* additional to that specified in the Description of Services or Statement of Work;
- (b) transportation costs for material samples and models, courier and delivery charges for deliverables additional to that specified in the Description of Services;
- (c) Travel and Living Expenses: Firms are advised that any travel-related expenses associated with the delivery of services will be calculated from the applicable government location (listed below) and/or from the consultant's office to the project site, which ever is closer.

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the *National Joint Council Travel Directive* and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

All travel must have the prior authorization of the Technical Authority.

All payments are subject to government audit.

The government location that will be used to calculate disbursements related to travel and living expenses is listed below:

4900 Yonge Street, Toronto, Ontario

- (d) Additional services' disbursements as authorised by the Departmental Representative, including Sub-Consultants and Specialists, required in support of the requested services under a call-up and which cannot be covered under the fixed hourly rate established under the Standing Offer. The cost for these services shall be administered as follows:
 - i) Unless otherwise authorized by the Departmental Representative, the above mentioned disbursements shall be obtained through competitive bidding with a minimum of two (2) quotes. Copies of all quotes shall be submitted together with the Consultant proposal for the call-up; or
 - ii) The disbursements shall be evaluated such that, in the event that competitive quotes are not obtained, the Consultant shall submit copies of invoices from other projects to help demonstrate the quote to be a fair, reasonable and competitive price.

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2. The following costs shall be included in the fees required to deliver the consultant services and shall not be reimbursed separately;

- (a) Reproduction and delivery costs of drawings, CADD files, specifications and other Technical Documentation specified in the Description of Services of Statement of work;
- (b) 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;
- (c) Plotting;
- (d) Presentation material;
- (e) (d) Travel time;
- (f) Local project office.

3. Disbursements shall be Project related and shall not include expenses that are related to the normal operation of the Consultant's business. The amounts payable, shall not exceed the amount entered in the Call-up, without the prior authorization of the Departmental Representative.

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ANNEX “C”

INSURANCE REQUIREMENTS

ANNEX "C"

INSURANCE REQUIREMENTS

1. General

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

2. Commercial General Liability

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

3. Professional Liability

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

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ANNEX “D”

SECURITY REQUIREMENTS CHECKLIST



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Security Classification / Classification de sécurité UNCLASSIFIED

**SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)**

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE			
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine		Public Works and Government Services Canada	
2. Branch or Directorate / Direction générale ou Direction RPB			
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Retain consulting firms for Building Condition Reports in Ontario region			
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. Indicate the type of access required / Indiquer le type d'accès requis			
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input type="checkbox"/> No Non	<input checked="" type="checkbox"/> Yes Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès			
Canada <input type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>	
7. b) Release restrictions / Restrictions relatives à la diffusion			
No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>	
Not releasable À ne pas diffuser <input type="checkbox"/>			
Restricted to: / Limité à : <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays :	Restricted to: / Limité à : <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays :	Restricted to: / Limité à : <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays :	
7. c) Level of information / Niveau d'information			
PROTECTED A PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A PROTÉGÉ A <input type="checkbox"/>	
PROTECTED B PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B PROTÉGÉ B <input type="checkbox"/>	
PROTECTED C PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>	
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	
SECRET SECRET <input type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET SECRET <input type="checkbox"/>	
TOP SECRET TRÈS SECRET <input type="checkbox"/>		TOP SECRET TRÈS SECRET <input type="checkbox"/>	
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>	



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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No / Non Yes / Oui
Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

- | | | | |
|---|---|---|--|
| <input checked="" type="checkbox"/> RELIABILITY STATUS
COTE DE FIABILITÉ | <input type="checkbox"/> CONFIDENTIAL
CONFIDENTIEL | <input type="checkbox"/> SECRET
SECRET | <input type="checkbox"/> TOP SECRET
TRÈS SECRET |
| <input type="checkbox"/> TOP SECRET - SIGINT
TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL
NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET
NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET
COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS
ACCÈS AUX EMPLACEMENTS | | | |

Special comments:
Commentaires spéciaux : _____

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No / Non Yes / Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? No / Non Yes / Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No / Non Yes / Oui



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PART C - (continued) / PARTIE C - (suite)

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.
Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.
Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC						
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET	
				CONFIDENTIEL		TRÈS SECRET	NATO DIFFUSION RESTREINTE	NATO CONFIDENTIEL			A	B	C	CONFIDENTIEL		TRÈS SECRET	
Information / Assets / Renseignements / Biens / Production																	
IT Media / Support TI																	
IT Link / Lien électronique																	

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



Government of Canada
Gouvernement du Canada

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Security Classification / Classification de sécurité
UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

13. Organization Project Authority / Chargé de projet de l'organisme

Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Barbu, Michael		Senior Maintenance Management Specialist	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
416-512-5683	416-512-5519	Michael.Barbu@pwgsc.gc.ca	

14. Organization Security Authority / Responsable de la sécurité de l'organisme

Name (print) - Nom (en lettres moulées)		Title - Titre	Signature	Digitally signed by VonZuben, John DN: c=CA, o=GC, ou=PWGSC-TPSGC, cn=VonZuben, John Date: 2015.11.13 11:22:20 -05'00'
von Zuben, John		SO		
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date	2015-11-13
416-512-5968	416-529-6481	John.vonZuben@pwgsc.gc.ca		

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? No Yes.
Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes? Non Oui

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Lauren Woodhall		Supply Specialist	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
416-512-5873		lauren.woodhall@pwgsc.gc.ca	18/12/2015

17. Contracting Security Authority / Autorité contractante en matière de sécurité

Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Chantel Loates		Contract Security Officer	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
613-948-7687		chantel.loates@pwgsc.gc.ca	Nov 16, 2015

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ANNEX “E”

SUBMISSIONS REQUIREMENTS AND EVALUATION

ANNEX "E"

SUBMISSIONS REQUIREMENTS AND EVALUATION (SRE)

SRE 1 - General Information
SRE 2 - Offer Requirements
SRE 3 - Submission Requirements and Evaluation
SRE 4 - Price of Services
SRE 5 - Submission Requirements Checklist

SRE 1 - GENERAL INFORMATION

1.1 Reference to the Selection Procedure

An overview of the selection procedure can be found in 'Part 4 – Evaluation Procedures and Basis of Selection'.

1.2 Submission of Offers

The Offeror is responsible for meeting all submission requirements.

The evaluation will be based solely on the offer information submitted.

Follow the 2006 (2015-07-03) Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, Article 5, entitled "Submission of Offers."

There should be no assumption that this Request for Standing Offer (RFSO) is similar to previous RFSO's, and submitted material should ensure that all requested information is covered.

SRE 2 - OFFER REQUIREMENTS

2.1 Requirement for Offer Format

Implement the following format in preparation of the offer:

- Submit one (1) bound original plus four (4) bound copies of the offer.
- Paper size should be: 216mm x 279mm (8.5" x 11").
- Minimum font size - 11 point Times or equal
- Minimum margins: 25mm left; 12mm right, top, and bottom
- Double-sided submissions
- One (1) 'page' means one side of a 216mm x 279mm (8.5" x 11") sheet of paper.
- 279mm x 432 mm (11" x 17") fold-out sheets for spreadsheets, organization charts etc. will be counted as two pages.
- The order of the offers should follow the order of the Request for Standing Offer SRE 3 section.

2.2 Specific Requirements for Offer Format

Maximum number of pages (including text and graphics) to be submitted for the Rated Requirements under SRE 3.2 is fifty (50) pages.

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

- Covering letter
- Table of Contents
- Tabs / Page Dividers (provided they are free of text and/or graphics)
- Front page of the Request for Standing Offer document
- Front page of revision(s) to the Request for Standing Offer document
- Request for Standing Offer (RFSO) Certifications Form (Part 5)
- Price Offer Form (Annex "F")
- Team Identification Form (Annex "G")

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

SRE 3 - SUBMISSION REQUIREMENTS AND EVALUATION

3.1 Mandatory Requirements

Failure to meet the mandatory requirements referred below in 3.1.1 and 3.1.2 render the offer as non-responsive and no further evaluation will be carried out.

3.1.1 Licensing, Certification or Authorization

The Offeror shall be authorized to provide Architectural and/or Engineering services and must include architects and engineers licensed, or eligible to be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial or territorial law in the province of Ontario.

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

3.1.2 Consultant Team Identification

The consultant team to be identified must include the following:

- | | |
|----------------------------------|--------------------------------------|
| Offeror (Prime Consultant): | - Architectural or Engineering Firm |
| Key Sub-consultants/Specialists: | - Architect |
| | - Structural Engineer |
| | - Civil Engineer |
| | - Vertical Transportation Specialist |
| | - Mechanical Engineer |
| | - Electrical Engineer |

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

The consultant team is to be identified in Annex "G" - Team Identification.

3.2 Rated Requirements

Offers meeting the mandatory requirements will be evaluated in accordance with the following criteria. The clarity of the offer 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

1. What is being looked for:

Demonstration of the understanding of the overall requested services, including specific deliverables, expected approaches, technical expectations, and coordination requirements, especially in delivering government projects.

2. What Offeror should provide:

- Scope of services - detailed list of services.
- Summary of proposed typical work breakdown structure (i.e. resources assigned, time schedule, level of effort).
- Risk management strategy.
- Project management approach to working with PWGSC (understanding of PWGSC management structure, Client environment, Standing Offer process, working with the government in general).

3.2.2 Team Approach / Management of Services

1. What is being looked for:

Description of team organization in its approach and methodology in the delivery of the requested services.

2. What Offeror should provide:

A description of:

- Roles and responsibilities of key personnel.
- Assignment of resources and availability of qualified back-up personnel.
- Management and organization (reporting structure).
- Intended approach in responding to individual call-ups against a standing offer.
- Quality control techniques.
- Intended approach to meeting the 'Project Response Time Requirements'.
- Conflict resolution.

3.2.3 Past Experience

1. What is being looked for:

Demonstration that over at least the past five (5) years, the Offeror or its senior personnel have completed building condition evaluations and produced Building Condition Reports that include an assessment of building component remaining life and recommendations for component life extension and replacement projects covering a period of at least twenty-five years into the future.

2. What Offeror should provide:

A brief description of a maximum of ten (10) significant building condition evaluation projects completed over the last five (5) years by the firm, or its senior personnel. For the above projects, include/indicate:

- Names of senior personnel and project personnel who were involved as part of the project team and their respective responsibilities.
- Whether the building condition data was entered into a database (e.g. VFA, Recapp etc.).
- Dates the services were provided for the listed projects.
- Scope of services rendered, project objectives, constraints and deliverables.
- Client references - name, address, phone and fax of client contact at working level - reference checks may be completed.
- Whether projects were carried out in joint venture and the responsibilities of each of the involved firms.

3.2.4 Senior Personnel Expertise and Experience

1. What is being looked for:

A demonstration that the Offeror has senior personnel with the capability, capacity and expertise to manage and lead a technical team carrying out the requested services.

2. What Offeror should provide:

Submit a maximum of two (2) curriculum vitae (c.v.'s) of Prime Consultant senior personnel and 1 one (1) c.v. of senior personnel for each Sub-Consultants/Specialist of the consultant team. Each CV must clearly indicate:

- Years of experience in the provision of the requested services.
- Years of experience.
- Years associated with the firm.
- Professional accreditation.
- Accomplishments/achievements/awards.

3.2.5 Project Personnel Expertise and Experience

1. What is being looked for:

Demonstration of project personnel, in-house or subcontracted, with the capability, capacity and expertise to provide the requested services.

2. What Offeror should provide:

Submit a maximum of two (2) c.v.'s of Prime Consultant project personnel and one (1) c.v. of project personnel for each Sub-Consultants/Specialist of the consultant team which will perform the majority of the work resulting from the individual Call-ups. Each CV must clearly indicate:

- Years of experience in the provision of the requested services.
- Years of experience.
- Years associated with the firm.
- Professional accreditation.
- Accomplishments/achievements/awards.

3.2.6 Hypothetical Projects

1. What is being looked for:

Description of approach and methodology to be employed in delivery of the requested services, in a general written response only.

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

2. What the Offeror should provide for each hypothetical project:

A description of:

- Approach and methodology to be employed in organizing and carrying out the requested services.
- Proposed work breakdown structure (i.e. scope of work, resources assigned, time schedule and level of effort, in terms of number of hours for all resource categories).
- Appropriateness of assigned resources.
- Level of effort.
- Project management approach to working with PWGSC (understanding of PWGSC management structure, Client environment, Standing Offer process, working with the government in general).
- Problem-solving methodology (client involvement, PWGSC involvement, other government agency involvement, creative approaches to solving problems).

Calculation of a fee for the provision of these services is not required.

The Facts:

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

PROJECT 1

Facility A is a single tenant office facility, 25 years old, with no basement, a ground floor mechanical room with rooftop HVAC equipment, and 15000m² 'floor area' over 2 storeys, located on a 1 hectare site with a surface parking/loading area.

Describe the organizational approach employed to conduct a Building Condition Report.

PROJECT 2

Facility D is a multi-tenant, mixed-use campus facility with high security requirements and restricted access, consisting of:

- *Site.*
- *A 7-storey office building.*
- *A 2 storey warehouse building*
- *A 3 storey parking garage building with sub lease parking authority.*

Explain how the project approach, work breakdown structure and level of effort to conduct a Building Condition Report for this campus would differ from that of a typical office building.

3.3 Evaluation and Rating

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

Criterion	Weight Factor	Rating	Weighted Rating
Comprehension of Scope of Services	1.5	0 - 10	0 - 15
Team Approach / Management of Services	1.5	0 - 10	0 - 15
Past Experience	1.5	0 - 10	0 - 15
Senior Personnel Expertise and Experience	1.0	0 - 10	0 - 10
Project Personnel Expertise and Experience	2.0	0 - 10	0 - 20
Hypothetical Projects	2.5	0 - 10	0 - 25
Total Technical Rating	10.0		0 - 100

Generic Evaluation Table

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

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

	Sample projects not related to this requirement	Sample projects generally not related to this requirement	Sample projects generally related to this requirement	Sample projects directly related to this requirement	Leads in sample projects directly related to this requirement
	Extremely poor, insufficient to meet performance requirements	Little capability to meet performance requirements	Acceptable capability, should ensure adequate results	Satisfactory capability, should ensure effective results	Superior capability, should ensure very effective results

Offer **must** achieve a minimum total technical rating of sixty (60) out of the hundred (100) points available as specified above to receive further consideration.

No further consideration will be given to offers not achieving the pass mark of sixty (60) points.

4 - PRICE OF SERVICES

All price offer envelopes corresponding to responsive offers which have achieved the pass mark of sixty (60) points are opened upon completion of the technical evaluation.

5 - SUBMISSION REQUIREMENTS - CHECKLIST

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

- Offer – 1 original + 4 copies
- Front page of Request for Standing Offer - completed and signed, 1 original.
- Front page of Revision(s) to a Request for Standing Offer - completed and signed, 1 original.
- Certifications – completed and signed form provided in Part 5
- Consultant Team Identification – completed form provided in Annex "G".

In a separate envelope:

- Price Offer Form – one (1) completed and signed form provided in Annex "F", submitted in a separate envelope

END OF ANNEX "E" - SUBMISSIONS REQUIREMENTS AND EVALUATION

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PWL-5-38148

Id de l'acheteur - Buyer ID
pw1035
N° CCC / CCC No. / N° VME - FMS

ANNEX "F"

PRICE OFFER

ANNEX "F"

PRICE OFFER

INSTRUCTIONS

1. Complete price offer form and submit in a separate sealed envelope, with the Offeror's name, Solicitation Number, and "Price Offer Form" typed on the outside.
2. Price offers are not to include GST/HST and will be evaluated in Canadian Dollars.
3. Offerors are not to alter or add information to the form.
4. 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: Offerors 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. **There must be no \$0 value or NIL value. Failure to insert an hourly rate for each position listed will render your offer non-responsive.**
5. The Offeror shall provide a single fixed hourly rate for each category of personnel of each sub-consultant and specialist for the duration of the Standing Offer.
6. Travel and Living Expenses: Firms are advised that any travel-related expenses associated with the delivery of services will be calculated from the applicable government location (listed under Disbursements) and/or from the consultant's office to the project site, which ever is closer. Travel-related expenses will be paid (with prior approval of the Departmental Representative) in accordance with current National Joint Council (NJC) Travel Directive.
7. Fixed hourly rates for each category are to be provided in column B and are then multiplied by the weight factor in column A (provided for evaluation purpose only).
8. In the summary table, Weighted Hourly Rates for each Discipline are to be entered in column B and then multiplied by the weight factor % in column A (provided for evaluation purposes only).
9. In the event that a mathematical error occurs in carrying over the totals, PWGSC will correct the totals to ensure the fairness of the Offers.

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ANNEX "F"

PRICE OFFER

Name of Offeror: _____

Address: _____

I. Prime Consultant (Offeror): Architect or Engineer

Firm Name - _____

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (A x B)
Partners or Principles of Firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	15	\$	\$
Administrative Support	15	\$	\$
Total	100		\$

II. Key Sub Consultant/Specialist

A - Key Sub Consultant/Specialist: Architect

Firm Name - _____

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (A x B)
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	20	\$	\$
Administrative Support	15	\$	\$
Total	100		\$

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B - Key Sub Consultant/Specialist: Structural Engineer

Firm Name - _____

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (A x B)
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	20	\$	\$
Administrative Support	15	\$	\$
Total	100		\$

C - Key Sub Consultant/Specialist: Civil Engineer

Firm Name - _____

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (A x B)
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	20	\$	\$
Administrative Support	15	\$	\$
Total	100		\$

D - Key Sub Consultant/Specialist: Vertical Transportation Specialist

Firm Name - _____

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (A x B)
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	20	\$	\$
Administrative Support	15	\$	\$
Total	100		\$

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E - Key Sub Consultant/Specialist: Mechanical Engineer

Firm Name - _____

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (A x B)
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	20	\$	\$
Administrative Support	15	\$	\$
Total	100		\$

F - Key Sub Consultant/Specialist: Electrical Engineer

Firm Name - _____

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (A x B)
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	20	\$	\$
Administrative Support	15	\$	\$
Total	100		\$

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Price Offer Summary Table

Discipline	Weight Factor % (A)	Weighted Hourly Rates (B)	Total (A x B)
Prime Consultant	10%	\$	\$
Architect	25%	\$	\$
Structural Engineer	10%	\$	\$
Civil Engineer	5%	\$	\$
Vertical Transportation Specialist	10%	\$	\$
Mechanical Engineer	20%	\$	\$
Electrical Engineer	20%	\$	\$
Total of all Disciplines for Evaluation Purposes	100%		\$

Signature of Consultant or Joint Venture Consultants.

_____ capacity

_____ signature

END OF ANNEX "F" – PRICE OFFER

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ANNEX “G”

TEAM IDENTIFICATION

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ANNEX "G"

TEAM IDENTIFICATION

INSTRUCTIONS

1. Complete the Consultant Team Identification in the format provided below, including the following information for each identified team member of the Consultant Team; Name, Category of Personnel and Provincial Professional Licensing Status.
2. Provide short CVs for each identified team member. Each CV should have sufficient detail to explain experience in the respective discipline(s).
3. CV's provided under Annex "G" Team Identification, will **not** form part of the evaluation or page limitation identified under 'Annex "E" SRE 3.2 Rated Requirements section, and are to appear under Annex "G" **only**.

Note that Annex "E" SRE 3.2 Rated Requirements has a separate requirement which includes the provision of CV's for evaluation purposes (SRE 3.2.4 & 3.2.5).

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

I. Prime Consultant (Offeror): Architect or Engineer

Firm Name - _____

Key individuals -

- Name. _____
 - Category of Personnel (i.e. Principal, Senior, Intermediate). _____
 - Provincial professional licensing status _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

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II. Key Sub Consultant/Specialist

A - Key Sub Consultant/Specialist: Architect

Firm Name - _____

Key individuals - _____

- Name. _____
 - Categoroy of Personnel (i.e. Principal, Senior, Intermediate). _____
 - Provincial professional licensing status _____
- _____
- _____
- _____

B - Key Sub Consultant/Specialist: Structural Engineer

Firm Name - _____

Key individuals - _____

- Name. _____
 - Categoroy of Personnel (i.e. Principal, Senior, Intermediate). _____
 - Provincial professional licensing status _____
- _____
- _____
- _____

C - Key Sub Consultant/Specialist: Civil Engineer

Firm Name - _____

Key individuals - _____

- Name. _____
 - Categoroy of Personnel (i.e. Principal, Senior, Intermediate). _____
 - Provincial professional licensing status _____
- _____
- _____
- _____

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D - Key Sub Consultant/Specialist: Vertical Transportation Specialist

Firm Name - _____

Key individuals - _____
• Name. _____
• Category of Personnel (i.e. Principal, Senior, Intermediate). _____
• Provincial professional licensing status _____

E - Key Sub Consultant/Specialist: Mechanical Engineer

Firm Name - _____

Key individuals - _____
• Name. _____
• Category of Personnel (i.e. Principal, Senior, Intermediate). _____
• Provincial professional licensing status _____

E - Key Sub Consultant/Specialist: Electrical Engineer

Firm Name - _____

Key individuals - _____
• Name. _____
• Category of Personnel (i.e. Principal, Senior, Intermediate). _____
• Provincial professional licensing status _____

END OF ANNEX "G" – TEAM IDENTIFICATION