

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

**Bid Receiving  
PWGSC  
33 City Centre Drive  
Suite 480C  
Mississauga  
Ontario  
L5B 2N5**

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

Regional Individual Standing Offer (RISO)  
Offre à commandes individuelle régionale (OCIR)

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**  
Public Works and Government Services Canada  
Ontario Region  
33 City Centre Drive  
Suite 480  
Mississauga  
Ontario  
L5B 2N5

|   |  |
|---|--|
| <b>Title - Sujet</b><br>Sustainability & Greening Services  |  |
| <b>Solicitation No. - N° de l'invitation</b><br>EQ447-160412/A  | <b>Date</b><br>2016-04-28  |
| <b>Client Reference No. - N° de référence du client</b><br>EQ447-160412   | <b>GETS Ref. No. - N° de réf. de SEAG</b><br>PW-\$TOR-018-7102                   |
| <b>File No. - N° de dossier</b><br>TOR-6-39005 (018)  | <b>CCC No./N° CCC - FMS No./N° VME</b>   |
| <b>Solicitation Closes - L'invitation prend fin</b><br><b>at - à 02:00 PM</b><br><b>on - le 2016-06-08</b>  | <b>Time Zone</b><br><b>Fuseau horaire</b><br>Eastern Daylight Saving<br>Time EDT |
| <b>Delivery Required - Livraison exigée</b><br>See Herein   |  |
| <b>Address Enquiries to: - Adresser toutes questions à:</b><br>Pan, Long  | <b>Buyer Id - Id de l'acheteur</b><br>tor018                                     |
| <b>Telephone No. - N° de téléphone</b><br>(905)615-2076 ( )   | <b>FAX No. - N° de FAX</b><br>( ) -  |
| <b>Destination - of Goods, Services, and Construction:</b><br><b>Destination - des biens, services et construction:</b><br>DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA<br>11TH FL.<br>4900 YONGE ST<br>Toronto<br>Ontario<br>M2N6A6<br>Canada |  |
| <b>Security - Sécurité</b><br>This request for a Standing Offer includes provisions for security.<br>Cette Demande d'offre à commandes comprend des dispositions en matière de sécurité.  |  |

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

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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 and Additional Information: includes the certifications and additional information 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 Statement of Work, Basis of Payment, Security Requirement Check List, Forms, Sample Calculation of Aggregate Charge-out Rate, Best Value Selection – Example, and Sample Claim Form.

### 1.2 Summary

This requirement is for a Regional Individual Standing Offer (RISO) for the provision of professional and technical services for Sustainability and Greening Government Operations services in Ontario Region for Public Works & Government Services Canada.

Details of the Statement of Work for the Stream are contained in Annex "A".

The number of Regional Individual Standing Offers (RISOs) which are anticipated for each Stream are as follows:

| Stream | # of RISOs | Expected Expenditure (HSTI)<br>for the two year period from Contract award |
|--------|------------|--|
| 6      | 1          | \$ 400,000.00  |

The period of the RISOs is from date of issue to 2 years later with the right to request two additional one year extension periods.

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There is a security requirement associated with this requirement. For additional information, consult Part 6 - Security, Financial and Insurance Requirements, and Part 7A - Standing Offer. For more information on personnel and organization security screening or security clauses, Offerors should refer to the Canadian Industrial Security Directorate (CISD), Industrial Security Program of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

The requirement is subject to the provisions of the North American Free Trade Agreement (NAFTA), and the Agreement on Internal Trade (AIT).

There is a Federal Contractors Program (FCP) for employment equity requirement associated with this procurement; see Part 5 – Certifications and Additional Information, Part 7A -Standing Offer, and Part 7B - Resulting Contract Clauses and the annex named Federal Contractors Program for Employment Equity - Certification.

### **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) 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>) 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 (2016-04-04) 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

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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 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.



## **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 (4 hard copies and 2 soft copies on USB drive)

Section II: Financial Offer (2 hard copies and 2 soft copies on USB drive)

Section III: Certifications (2 hard copies)

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

Prices must appear in the financial 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 B, Basis of Payment. The total amount of Applicable Taxes must be shown separately.

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

Offerors must submit the certifications and additional information 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

Each offer will be reviewed for compliance with the mandatory requirements of the Request for Standing Offer. Offers that do not comply with each and every mandatory requirement will be considered non-responsive and be disqualified.

Each responsive offer will be rated by assigning a score to the rated requirements, which are identified in the Request for Standing Offer by reference to a score. Offerors who fail to submit complete offers with all the information requested by this Request for Standing Offer will be rated accordingly. There is a mandatory overall pass mark of **308 points**; any offer that receives less than **308 points** will be excluded from further consideration.

##### 4.1.1.1 Mandatory Technical Criteria

**M1.** The Offeror must submit with their offer the information requested in Annex D. Offerors must submit either a completed Annex "D" or a technical offer in a similar format with the same information requested. The maximum number of pages (including text and graphics) to be submitted for the Rated Requirements is specified on each form in Annex D. Any information submitted in an offer which exceeds the maximum number of pages identified may not be evaluated.

**M2. Relevant Experience of the Firm:**

To demonstrate its ability to meet the requirement, the Offeror must submit ten (10) examples of projects that have been completed by the firm (by the solicitation closing date) which are relevant\* to the work detailed in Annex A Statement of Work. If more than 10 projects are submitted, only the first 10, as they appear in the offer, will be evaluated. (See Annex D, Form 2.)

\*relevant refers to work that pertains or relates directly to the work outlined in Annex A Statement of Work in terms of the scope, tasks, deliverables, subject and required knowledge.

**M3. Corporate Capability Table:**

- a. The Offeror must provide with their offer the names of each individual proposed for each of the twenty-five (25) categories/specializations identified.

The Offeror may propose the same individual for a maximum of two categories/ specializations (i.e. only listed twice in the table). To specify, an individual may be listed twice in the Corporate Capability Table regardless of category. All individuals proposed must be employed directly by the Offeror (or by one of the companies forming a joint-venture); sub-contractors will not be considered. Four (4) of the twenty-five (25) categories/ specializations will be evaluated in greater depth in section 4.

Four (4) different individuals must be proposed for each of the following four (4) specializations as key personnel: Senior Project Manager, Senior Sustainability Specialist, LEED Certified Professional and Sustainable Building Specialist.

- b. The Offeror must provide the following information for Form 3A (or similar format):

(a) Name of Individual: Individual's names must be provided for all 25 Specializations in the following categories:

- i. Senior Contact Representing the Firm
- ii. Senior Professional
- iii. Intermediate Professional
- iv. Junior Professional
- v. Senior Technologist
- vi. Technologist

(b) Education: highest level of degrees, diplomas or certificates.

(c) Accreditation: type of accreditation (i.e. full, provisional, in training, etc), Professional associations along with the jurisdiction the accreditation applies to (e.g. Ontario) and validity date.

#### 4.1.1.2 Point Rated Technical Criteria

**P1: Team Approach and Management of Services**

Maximum Points  
100 points

The Offeror is requested to demonstrate how the proposed team will be organized and their approach and methodology in the delivery of the required services.

Offerors should demonstrate that they have the capability to provide all of the required services as specified in Annex A, Statement of Work in a well-managed manner. The team approach is to ensure services meet quality standards in a cost effective and timely manner.

The Offeror is requested to provide roles and responsibilities for the four (4) key personnel, back-up plan, approach to responding to call-ups, quality control techniques and budget and schedule control techniques. (See Annex D, Forms 1A, 1B, and 1C.)

**P2: Relevant Experience of the Firm**

Maximum Points  
90 points

Further to M2, the ten (10) project examples provided will be evaluated based on the following:

- Types of Projects
- Range of services: demonstration of the full range of services as described in Annex A
- Location of experience
- Experience with Federal Government projects
- Dollar value of projects
- Variety of clients
- References

(See Annex D, Form 2)

Projects should vary in size, complexity and dollar value. Projects should demonstrate a wide range of services applicable to the statement of work. Projects which have been completed for federal government clients, other levels of government clients and non-government clients are acceptable; however, projects that have been completed in the province of Ontario will obtain additional points.

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A distinct phase or stage of a larger project or program will be considered a project in its own right as long as the work associated with that phase is completed and consists of a series of tasks similar to those described in Annex A Statement of Work.

### **P3:Corporate Capability Table**

Maximum Points

Minimum Points

126 points

63 points

Further to M3, the proposed individuals will be evaluated as follows:

#### Accreditation:

Full accreditation is expected for Senior and Intermediate Professionals. "In Training" is acceptable for "Junior Professional" and "Technologist" categories only. If a Senior or Intermediate Professional does not have an applicable accreditation they are still eligible for the specialization. If an individual proposed for the specialization does not have the accreditation specified for the category a mark of zero (0) will be assigned for accreditation for that individual.

Note: professional memberships are not considered acceptable as a substitute for an accreditation.

Scoring will be based on whether the individual has a license to practice in the relevant jurisdiction and has relevant professional accreditation or not. For all specializations the relevant jurisdiction is Ontario, except for those accreditations that are not issued regionally. QP is not considered an accreditation by a professional association and is therefore not considered acceptable. Certified Canadian Environmental Practitioner (CCEP) is considered acceptable.

Relevant professional accreditations considered acceptable include:

Professional Geoscientist (PGeo)  
Professional Engineer (PEng)  
Professional Biologist (PBio or RPBio)  
Chartered Chemist (C.Chem)  
Certified Technician (C.Tech)  
Certified Engineering Technologist (C.E.T)  
Applied Science Technologist (A.Sc.T)  
Certified Health Physicist (CHP or DABHP)  
Registered Professional Planner (RPP)  
Professional Agrologist (PAg)  
Diplomate of the American Board of Toxicology (DABT)  
Project Management Professional (PMP)  
Certified Environmental Professional (EP)\*  
LEED Green Associate  
LEED AP  
Registered Occupational Hygienist (ROH)  
Registered Occupational Hygiene Technologist (ROHT)  
Certified Industrial Hygienist (CIH)

\*On August 1, 2010, Canadian Certified Environmental Practitioner (CCEP) was merged under the credential EP – Environmental Professional <http://www.cecab.org/public/content.aspx?display=background>

#### Experience:

The Offeror should demonstrate that each of the proposed individuals has the minimum number of years of experience as outlined below.

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Buyer ID - Id de l'acheteur  
TOR018  
CCC No./N° CCC - FMS No./N° VME

Years of experience refers to the number of years the individual has worked in the discipline relevant to the Category of Specialization they are being proposed for and does not include time at school or time working in a different discipline.

Points will be awarded based on the number of years of experience for each of the following Categories:

- (i) Senior Contact Representing the Firm: 15 years
- (ii) Senior Professional and Senior Technologist: 10 years
- (iii) Intermediate Professional: 5 years
- (iv) Junior Professional and Technologist: 1 year

If an individual proposed for the specialization has experience less than the number of years as outlined above a mark of zero (0) will be assigned for years of experience for that individual

The weighting of marks is as follows: education 33.3%; accreditation 16.7%; experience 50%.

| <b>P4:Detailed Qualifications of Key Personnel</b> | <b>Maximum Points</b> | <b>Minimum Points</b> |
|--|-----------------------|-----------------------|
|  | 124 points            | 62 points             |

Further to M3, the Offeror will have identified four unique individuals as key personnel. Although these individuals may be repeated in other areas of the Corporate Capability Table, they may only be evaluated once in the "Detailed Qualifications of Key Personnel" section. In this section, individuals' education, accreditation, experience, relevant project experience, as well as program management responsibilities or technical expertise will be evaluated (see Annex D, Form 4.)

(Offerors should demonstrate that they have the range of personnel in-house with the capability, capacity, expertise and experience to provide the full range of required services and deliverables listed in the Statement of Work ANNEX "A". The expectation is that these personnel are available in order to deliver the required services for/to PWGSC.)

The four key individuals will be evaluated as per the detailed rating grid.

**TOTAL AVAILABLE POINTS: 440 points**

**MANDATORY PASS MARK: 308 points**

#### **4.1.2 Financial Evaluation**

The Offeror must submit pricing in accordance with Annex "B", Basis of Payment for the standing offer period and the two extension periods.

The Offeror must submit a fixed hourly rate, in Canadian funds, for each of the seven categories of personnel. Each of these fixed hourly rates will be weighted to reflect the expected level of involvement normal in the type of work to be performed. The weighted rates will then be aggregated to arrive at a Total Evaluated price for each offeror. The following weighting will be used:

|                                  |     |
|----------------------------------|-----|
| Senior Contact Representing Firm | 5%  |
| Senior Professional              | 20% |
| Intermediate Professional        | 20% |
| Junior Professional              | 10% |
| Senior Technologist              | 20% |
| Technologist                     | 20% |

Admin. Support 5%

A sample calculation is attached as Annex "E".

## 4.2 Basis of Selection

1. To be declared responsive, an offer must:
  - a. comply with all the requirements of the Request for Standing Offers;
  - b. meet all mandatory technical evaluation criteria; and
    - i. obtain the required minimum points specified for Point rated criterion P3 and 4 for the technical evaluation; and;
    - ii. obtain the required minimum of 308 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 440 points.
2. Offers not meeting (a) or (b) or (i) and (ii) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 50% for the technical merit and 50% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 50%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 50%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.
8. The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 50/50 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

### Basis of Selection - Highest Combined Rating Technical Merit (50%) and Price (50%)

|                         |                       | Bidder 1                    | Bidder 2                   | Bidder 3                   |
|-------------------------|-----------------------|-----------------------------|----------------------------|----------------------------|
| Overall Technical Score |                       | 115/135                     | 89/135                     | 92/135                     |
| Bid Evaluated Price     |                       | \$55,000.00                 | \$50,000.00                | \$45,000.00                |
| Calculations            | Technical Merit Score | $115/135 \times 50 = 42.59$ | $89/135 \times 50 = 32.96$ | $92/135 \times 50 = 34.07$ |
|                         | Pricing Score         | $45/55 \times 50 = 40.91$   | $45/50 \times 50 = 45$     | $45/45 \times 50 = 50.00$  |
| Combined Rating         |                       | 83.5                        | 77.96                      | 84.07                      |
| Overall Rating          |                       | 2nd                         | 3rd                        | 1st                        |

## 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. Unless specified otherwise, 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 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.

#### 5.1.1 Integrity Provisions – Required Documentation

In accordance with the *Ineligibility and Suspension Policy* (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Offeror must provide the required documentation, as applicable, to be given further consideration in the procurement process.

#### 5.1.2 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" list ) available at the bottom of the page of the [Employment and Social Development Canada-Labour's](http://www.esdc.gc.ca/en/jobs/workplace/human_rights/employment_equity/federal_contractor_program.page?&_ga=1.229006812.1158694905.1413548969) website ([http://www.esdc.gc.ca/en/jobs/workplace/human\\_rights/employment\\_equity/federal\\_contractor\\_program.page?&\\_ga=1.229006812.1158694905.1413548969](http://www.esdc.gc.ca/en/jobs/workplace/human_rights/employment_equity/federal_contractor_program.page?&_ga=1.229006812.1158694905.1413548969)).

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.

#### 5.1.3 Additional Certifications Precedent to Issuance of a Standing Offer

##### 5.1.3.1 Status and Availability of Resources

SACC Manual clause M3020T (2016-01-28) Status and Availability of Resources - Offer

## **PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS**

### **6.1 Security Requirements**

- 1) At the Request for Standing Offers closing date, 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 indicate 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) 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.

### **6.2 Financial Capability**

SACC Manual clause M9033T (2011-05-16) Financial Capability



## **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 Statement of Work 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.

**7.2.2** Security Requirement for Canadian Supplier:

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor/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 Contractor/Offeror must comply with the provisions of the:  
  - (a) Security Requirements Check List and security guide (if applicable), attached at Annex C;
  - (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>) issued by Public Works and Government Services Canada.

##### **7.3.1 General Conditions**

2005 (2016-04-04) 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 is two (2) years from date of issuance.

##### **7.4.2 Extension of Standing Offer**

If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for an additional two (2) one (1) year period, under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

Solicitation No. - N° de l'invitation  
EQ447-160412/A  
Client Ref. No. - N° de réf. du client

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

Buyer ID - Id de l'acheteur  
TOR018  
CCC No./N° CCC - FMS No./N° VME

The Offeror will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Standing Offer Authority before the expiry date of the Standing Offer. A revision to the Standing Offer will be issued by the Standing Offer Authority.

## **7.5. Authorities**

### **7.5.1 Standing Offer Authority**

The Standing Offer Authority is:

Long Pan  
Supply Team Leader  
Public Works and Government Services Canada  
Acquisitions Branch  
33 City Centre Drive, Suite 480C  
Mississauga, Ontario  
L5B 2N5

Telephone: (905) 615-2076  
Facsimile: (905) 615-2060  
E-mail address: long.pan@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 Project Authority**

The Project Authority for the Standing Offer is identified in the call-up against the Standing Offer.

The Project Authority 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's Representative**

To be inserted upon SO issuance.

## **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 a Representative of Environmental Services, PWGSC, Toronto, Ontario.

## **7.8 Call-up Procedures**

The Technical Authority will establish the scope of work to be performed.

The Technical Authority will provide the Standing Offer Holder (SOH) with a description of each task to be performed, in sufficient detail to enable the SOH to establish one of the following for the work: a firm price, a ceiling price or an estimated cost. Firm price is the most desirable and must be used whenever possible. Ceiling price will be permitted only in cases where the work to be performed is not in sufficient detail to accurately determine a reasonable firm price. Estimated costs will only be permitted in cases where the nature of the task is such that unknown developments are anticipated which could change the level of effort required to obtain the desired results.

The SOH must submit its price and supporting details to the Technical Authority's representatives including personnel to perform the work and time required to perform the work in a "proposal".

If the SOHs submission is acceptable to Canada, a call-up document will be issued to authorize the start of the work and outline the work requirements, providing deliverable milestone dates and any interim reports that will be required.

If Canada considers the SOHs submission to be unacceptable in some way, Canada will provide the SOH an opportunity to revise the submission. If Canada and the SOH are unable to agree on the scope of work or other particulars, Canada may proceed to another form of procurement of the services.

If, at any time during the work, it becomes evident that the authorized level of expenditure will be exceeded, the SOH must immediately advise the Technical Authority and await instruction. Under no circumstances is the authorized level of expenditure to be exceeded by the SOH.

All authority for travel must be obtained from the Technical Authority.

## **7.9 Call-up Instrument**

The Work will be authorized or confirmed by the Identified User(s) using form Call-up Against a Standing Offer or an electronic version.

## **7.10 Limitation of Call-ups**

Individual call-ups against the Standing Offer must not exceed \$400,000.00 (applicable taxes included).

## **7.11 Financial Limitation**

The total cost to Canada resulting from call ups against the Standing Offer must not exceed the sum of \$(to be provided upon issuance of Standing Offer), (Applicable Taxes excluded) unless otherwise authorized in writing by the Standing Offer Authority. The Offeror must not perform any work or services or supply any articles in response to call ups which would cause the total cost to Canada to exceed the said sum, unless an increase is so authorized.

The Offeror must notify the Standing Offer Authority as to the adequacy of this sum when 75 percent of this amount has been committed, or three months before the expiry date of the Standing Offer, whichever comes first. However, if at any time, the Offeror considers that the said sum may be exceeded, the Offeror must promptly notify the Standing Offer Authority.

## **7.12 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 (2016-04-04), General Conditions - Standing Offers - Goods or Services
- d) the general conditions 2035 (2016-04-04), General Conditions - High Complexity - Services
- f) Annex A, Statement of Work;
- g) Annex B, Basis of Payment;
- h) Annex C, Security Requirements Check List
- j) Annex D, Claim for Progress Payment Form;
- k) the Offeror's offer dated \_\_\_\_\_ (insert date of offer), (if the offer was clarified or amended, insert at the time of issuance of the offer: "as clarified on \_\_\_\_\_" or "as amended on \_\_\_\_\_" and insert date(s) of clarification(s) or amendment(s) if applicable).

## **7.13 Certifications**

### **7.13.1 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.

## **7.14 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 (2016-04-04), General Conditions - Higher Complexity - Services, 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.

#### **7.3.2 Delivery Date**

Delivery 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 Basis of Payment - Firm Price, Firm Unit Price(s) or Firm Lot Price(s)**

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price, as specified on the Call-up document. Customs duties are included and Applicable Taxes are extra.

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

### **7.5.2 Limitation of Expenditure**

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Annex B, to a limitation of expenditure as specified on Call-up document. Customs duties are included and Applicable Taxes are extra.

### **7.5.3 Travel and Living Expenses - National Joint Council Travel Directive**

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.

### **7.5.4 Limitation of Price**

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

### **7.5.5 Monthly Payment**

*SACC Manual* clause H1008C (2008-05-12) Monthly Payment

## **7.6 Invoicing Instructions**

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

Each invoice must be supported by:

- a. a copy of time sheets to support the time claimed;
- b. a copy of the release document and any other documents as specified in the Contract;
- c. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;

d. a copy of the monthly progress report.

2) Invoices must be distributed as follows:

- a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.
- b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.
- c. One (1) copy must be forwarded to the Technical Authority identified under the section entitled "Authorities" of the Contract.

## 7.7 Insurance Requirements

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

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

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

### 7.7.1 Commercial General Liability Insurance

- 1) The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$5,000,000 per accident or occurrence and in the annual aggregate.
- 2) The Commercial General Liability policy must include the following:
  - a. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
  - b. Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
  - c. Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
  - d. Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
  - e. Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must

apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.

f. Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.

g. Employees and, if applicable, Volunteers must be included as Additional Insured.

h. Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)

i. Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.

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

k. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

l. Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.

m. Non-Owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.

n. Litigation Rights: Pursuant to subsection 5(d) of the Department of Justice Act, S.C. 1993, c. J-2, s.1, if a suit is instituted for or against Canada which the Insurer would, but for this clause, have the right to pursue or defend on behalf of Canada as an Additional Named Insured under the insurance policy, the Insurer must promptly contact the Attorney General of Canada to agree on the legal strategies by sending a letter, by registered mail or by courier, with an acknowledgement of receipt.

For the province of Quebec, send to:

Director Business Law Directorate,  
Quebec Regional Office (Ottawa),  
Department of Justice,  
284 Wellington Street, Room SAT-6042,  
Ottawa, Ontario, K1A 0H8

For other provinces and territories, send to:

Senior General Counsel,  
Civil Litigation Section,  
Department of Justice  
234 Wellington Street, East Tower  
Ottawa, Ontario K1A 0H8

A copy of the letter must be sent to the Contracting Authority. Canada reserves the right to co-defend any action brought against Canada. All expenses incurred by Canada to co-defend such actions will be at Canada's expense. If Canada decides to co-defend any action brought against it, and Canada does not agree to a proposed settlement agreed to by the Contractor's insurer and the plaintiff(s) that would result in the settlement or dismissal of the action against Canada,



then Canada will be responsible to the Contractor's insurer for any difference between the proposed settlement amount and the amount finally awarded or paid to the plaintiffs (inclusive of costs and interest) on behalf of Canada.

#### **7.7.2 Environmental Impairment Liability Insurance**

- 1) The Contractor must obtain Type 4: "Contractors Professional Liability" insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$1,000,000 per accident or occurrence and in the annual aggregate.
- 2) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- 3) The Type 4: "Contractors Professional Liability" policy must include the following:
  - a. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada as additional insured should read as follows: Canada, represented by Public Works and Government Services Canada.
  - b. Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
  - c. Separation of Insureds: The policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
  - d. Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
  - e. Incidental Transit Extension: The policy must extend to losses arising from any waste, products or materials transported, shipped, or delivered via any transportation mode to a location beyond the boundaries of a site at which the Contractor or any entity for which the Contractor is legally liable is performing or has performed the operations described in the contract.
  - f. Litigation Rights: Pursuant to subsection 5(d) of the Department of Justice Act, S.C. 1993, c. J-2, s.1, if a suit is instituted for or against Canada which the Insurer would, but for this clause, have the right to pursue or defend on behalf of Canada as an Additional Named Insured under the insurance policy, the Insurer must promptly contact the Attorney General of Canada to agree on the legal strategies by sending a letter, by registered mail or by courier, with an acknowledgement of receipt.

For the province of Quebec, send to:  
Director Business Law Directorate,  
Quebec Regional Office (Ottawa),  
Department of Justice,  
284 Wellington Street, Room SAT-6042,  
Ottawa, Ontario, K1A 0H8

For other provinces and territories, send to:  
Senior General Counsel,  
Civil Litigation Section,  
Department of Justice  
234 Wellington Street, East Tower  
Ottawa, Ontario K1A 0H8



A copy of the letter must be sent to the Contracting Authority. Canada reserves the right to co-defend any action brought against Canada. All expenses incurred by Canada to co-defend such actions will be at Canada's expense. If Canada decides to co-defend any action brought against it, and Canada does not agree to a proposed settlement agreed to by the Contractor's insurer and the plaintiff(s) that would result in the settlement or dismissal of the action against Canada, then Canada will be responsible to the Contractor's insurer for any difference between the proposed settlement amount and the amount finally awarded or paid to the plaintiffs (inclusive of costs and interest) on behalf of Canada.

### **7.7.3 Automobile Liability Insurance**

- 1) The Contractor must obtain Automobile Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence.
- 2) The policy must include the following:
  - a. Third Party Liability - \$2,000,000 Minimum Limit per Accident or Occurrence
  - b. Accident Benefits - all jurisdictional statutes
  - c. Uninsured Motorist Protection
  - d. Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

## **ANNEX A**

### **STATEMENT OF WORK**

#### **STREAM 6: SUSTAINABILITY AND GREENING GOVERNMENT OPERATIONS**

##### **Background**

The Government of Canada has committed to reducing its environmental footprint, and PWGSC is an active participant in achieving this goal. In passing the *Federal Sustainable Development Act* in 2008, the government established a new and innovative sustainable development approach. The Act called for a Federal Sustainable Development Strategy (FSDS), to be updated every three years, as well as regular progress reports. The third cycle of the FSDS, covering the period 2016-2019 had been drafted and sets out the goals and targets the government will strive to meet in order to become a more sustainable country.

PWGSC endeavour's to manage its real property in a manner that optimizes the use of innovative sustainable building practices and promotes an integrated approach from the earliest stages of a fit-up, major renovation, or new construction project. PWGSC requires consulting services to assist with meeting Sustainable Development Strategy (SDS) commitments and departmental policy requirements with respect to Greening Government Operations.

##### **Scope of Work**

Work includes conducting various activities in support of project delivery and building management using sustainable measures or programs, greening government operations, sustainable design and certifications (using third party tools) of federal facilities or assets as well as other related work as required. Federal facilities that would require these services typically consist of office buildings, military bases and training areas, residential properties, airports, correctional institutions and research laboratories.

Services may include:

- conducting energy efficiency and renewable energy studies, energy modelling studies
- providing environmental footprint benchmarking, reporting and recommendations for areas of improvement
- conducting life cycle analysis or costing assessments and green supply chain studies
- conducting greenhouse gas (GHG) emissions studies or audits
- conducting water efficiency studies
- conducting indoor working environment and indoor air quality audits/assessments
- undertaking sustainability assessments of federal facilities or programs
- assessing, developing, implementing and/or auditing of environmental management systems
- recommending options to incorporate the use of environmentally preferable/ sustainable materials, resource selection and specifications
- providing recommendations for construction, renovation and demolition waste reduction
- assisting with project design to ensure adherence to environmental performance rating tools such as Leadership in Energy and Environmental Design (LEED), Green Globes or equivalent
- undertaking 3<sup>rd</sup> party verifications using specified evaluation tools such as: Athena, National Energy Code for Buildings, Green Globes, Building Owners and Managers Association Building Environmental Standards program (BOMA BEST), Energy Star, Envision, LEED, etc., of interior fit-ups, new construction, major renovation or building operation and maintenance
- undertaking stakeholder engagement
- assessing and providing recommendations regarding climate change impacts/adaptation
- contributing to sustainable policy development and planning
- developing training material and providing training on any of the topics listed above

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The consultant is expected to be current in their knowledge and use of applicable legislation, policies and guidelines.

All laboratories used for performing analysis must be members of the Canadian Association for Laboratory Accreditation (CALA). If CALA accreditation for a specific parameter is not available, equivalent accreditation bodies will be accepted.

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## ANNEX B

### BASIS OF PAYMENT

**Stream:** \_\_\_\_\_

**Offeror:** \_\_\_\_\_

A. **LABOUR** will be charged at **firm hourly rates**, inclusive of overhead and profit, in accordance with the following:

**Table for Standing Offer Contract Period Year 1 and Year 2:**

| #                                    | Specialization  | Hourly Rate for Contract Year 1 | Hourly Rate for Contract Year 2 |
|--------------------------------------|---|---------------------------------|---------------------------------|
| Senior Contact representing the firm |   |                                 |                                 |
| 1                                    | Senior Contact  | \$ _____ /hr                    | \$ _____ /hr                    |
| Senior Professional                  |   |                                 |                                 |
| 2                                    | Senior Project Manager*                                       | \$ _____ /hr                    | \$ _____ /hr                    |
| 3                                    | Senior Project Manager  |                                 |                                 |
| 4                                    | Senior LEED Certified professional                            |                                 |                                 |
| 5                                    | Senior Certified Environmental Auditor (ISO or CSA certified) |                                 |                                 |
| 6                                    | Senior Sustainability Specialist*                             |                                 |                                 |
| 7                                    | Senior Energy Assessor  |                                 |                                 |
| 8                                    | Senior Indoor Working Environment/ Air Quality                |                                 |                                 |
| Intermediate Professional            |   |                                 |                                 |
| 9                                    | Project Manager   | \$ _____ /hr                    | \$ _____ /hr                    |
| 10                                   | Project Manager   |                                 |                                 |
| 11                                   | Environmental Consultant                                      |                                 |                                 |
| 12                                   | LEED Certified professional*                                  |                                 |                                 |
| 13                                   | Energy assessor   |                                 |                                 |
| 14                                   | Indoor Working Environment/ Air Quality                       |                                 |                                 |
| 15                                   | Sustainable Building Specialist*                              |                                 |                                 |
| 16                                   | Environmental Consultant                                      |                                 |                                 |
| 17                                   | Certified Environmental Auditor (ISO or CSA certified)        |                                 |                                 |
| 18                                   | Environmental Consultant                                      |                                 |                                 |
| Junior Professional                  |   |                                 |                                 |
| 19                                   | LEED Specialist   | \$ _____ /hr                    | \$ _____ /hr                    |
| 20                                   | Environmental Consultant                                      |                                 |                                 |
| 21                                   | Energy assessor   |                                 |                                 |
| Senior Technologist                  |   |                                 |                                 |
| 22                                   | Senior Technician   | \$ _____ /hr                    | \$ _____ /hr                    |
| 23                                   | CADD/GIS  |                                 |                                 |
| Technologist                         |   |                                 |                                 |
| 24                                   | Field Technician  | \$ _____ /hr                    | \$ _____ /hr                    |
| 25                                   | CADD  |                                 |                                 |
| Admin Support                        |   |                                 |                                 |
| 26                                   | Administrative Support  | \$ _____ /hr                    | \$ _____ /hr                    |

**Table for Standing Offer Extension Period Year 1 and Year 2:**

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| #                                    | Specialization  | Hourly Rate for<br>Extension Year 1 | Hourly Rate for<br>Extension Year 2 |
|--------------------------------------|---|-------------------------------------|-------------------------------------|
| Senior Contact representing the firm |   |                                     |                                     |
| 1                                    | Senior Contact  | \$ _____ /hr                        | \$ _____ /hr                        |
| Senior Professional                  |   |                                     |                                     |
| 2                                    | Senior Project Manager*                                       | \$ _____ /hr                        | \$ _____ /hr                        |
| 3                                    | Senior Project Manager  |                                     |                                     |
| 4                                    | Senior LEED Certified professional                            |                                     |                                     |
| 5                                    | Senior Certified Environmental Auditor (ISO or CSA certified) |                                     |                                     |
| 6                                    | Senior Sustainability Specialist*                             |                                     |                                     |
| 7                                    | Senior Energy Assessor  |                                     |                                     |
| 8                                    | Senior Indoor Working Environment/ Air Quality                |                                     |                                     |
| Intermediate Professional            |   |                                     |                                     |
| 9                                    | Project Manager   | \$ _____ /hr                        | \$ _____ /hr                        |
| 10                                   | Project Manager   |                                     |                                     |
| 11                                   | Environmental Consultant                                      |                                     |                                     |
| 12                                   | LEED Certified professional*                                  |                                     |                                     |
| 13                                   | Energy assessor   |                                     |                                     |
| 14                                   | Indoor Working Environment/ Air Quality                       |                                     |                                     |
| 15                                   | Sustainable Building Specialist*                              |                                     |                                     |
| 16                                   | Environmental Consultant                                      |                                     |                                     |
| 17                                   | Certified Environmental Auditor (ISO or CSA certified)        |                                     |                                     |
| 18                                   | Environmental Consultant                                      |                                     |                                     |
| Junior Professional                  |   |                                     |                                     |
| 19                                   | LEED Specialist   | \$ _____ /hr                        | \$ _____ /hr                        |
| 20                                   | Environmental Consultant                                      |                                     |                                     |
| 21                                   | Energy assessor   |                                     |                                     |
| Senior Technologist                  |   |                                     |                                     |
| 22                                   | Senior Technician   | \$ _____ /hr                        | \$ _____ /hr                        |
| 23                                   | CADD/GIS  |                                     |                                     |
| Technologist                         |   |                                     |                                     |
| 24                                   | Field Technician  | \$ _____ /hr                        | \$ _____ /hr                        |
| 25                                   | CADD  |                                     |                                     |
| Admin Support                        |   |                                     |                                     |
| 26                                   | Administrative Support  | \$ _____ /hr                        | \$ _____ /hr                        |

Note: Even if several individuals are proposed by an Offeror for a category, a single charge-out rate must be offered for each category (i.e., each person in that category will be charged out at the same rate.)

- B. **DIRECT CHARGES** will be charged at actual cost with no mark-up and no provision for profit. **Allowable direct charges are shown in Appendix "1" to Annex "B" entitled, "Standard Disbursement Table"**. Offerors are **not** expected to provide an estimate of these costs at this time. The amount of allowable direct charges will be determined at the time of each call-up.

1. Equipment
2. Rentals
3. Materials, Supplies, Instrumentation, Components
4. Subcontracts
5. Authorized Travel and Living expenses: 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 (NJC) Travel Directive and with the other provisions of the directive referring to "travellers", rather than those referring to "employees". The current rates are posted on: <http://www.njc-cnm.gc.ca/directive/index.php?sid=98&lang=eng>  
(Note: travel and living expenses quoted by NJC include HST. Need to separate when submitting invoices to Environmental Services/).

NOTE: The Technical Authority reserves the right to deduct payment from the claim in lieu of deficiencies. Once deficiencies have been rectified, the Offeror must submit a new claim for the amount that has been deducted.

## APPENDIX 1 TO ANNEX B

### DISBURSEMENT STANDARDIZATION

#### Equipment & Rentals

| Disbursement Items                  | Examples of Inclusionary   | Maximum Allowable Unit Rate | Variations | Remarks   |
|-------------------------------------|--|-----------------------------|------------|---|
| Air Sampling Equipment              |  | Negotiable: Daily or Weekly | -          | -   |
| Sampling Equipment                  | duct tape, gloves, axe, crowbar, drill, hammer, knife, measuring tape, screwdrivers, pails, stakes, shovel, trowel,          | No charge                   | No charge  | Items that are not project specific (i.e. Are not solely required for this job, and that will be used by the consultant for future projects) should not be charged to PWGSC projects. Considered as overhead. Project specific and/or specialized field equipment must be pre-negotiated with PWGSC project manager |
| Field Equipment / Health and Safety | boot covers, cartridges, coveralls, 1/2 face masks, gloves, goggles, sunscreen, rain jackets, bug jackets, life jackets, etc | No charge                   | No charge  | Overhead<br>Project specific or specialized H&S equipment required on a project specific basis must be pre- negotiated with PWGSC project manager   |
| Camera                              |  | No charge                   | No charge  | Overhead  |
| Combustible Gas Meter               | Gastech, etc.  | \$50/day                    | \$200/week | Max allowable rates are for equipment owned by the consultant.<br>Costs for equipment that is rented from a company outside of the  |

|  |  |           |            |   |
|--|--|-----------|------------|---|
| Photoionization Detector                   |  | \$65/day  | \$260/week | Max allowable rates are for equipment owned by the consultant.<br>Costs for equipment that is rented from a company outside of the consultants firm can be recovered with receipts.                     |
| Oil/Water Interface Probe                  |  | \$40/day  | \$160/week | Max allowable rates are for equipment owned by the consultant.<br>Costs for equipment that is rented from a company outside of the  |
| Water Level Meter                          |  | \$30/day  | \$120/week | Max allowable rates are for equipment owned by the consultant.<br>Costs for equipment that is rented from a company outside of the  |
| Sampling Containers                        |  | No charge | No charge  | If laboratory fee applies for specialized sampling containers for specific analysis, this must be pre-identified in the consultant's proposal and the receipt submitted from the lab for cost recovery. |
| Survey Equipment                           | Laser level  | \$50/day  | \$200/week | Max allowable rates are for equipment owned by the consultant.<br>Costs for equipment that is rented from a company outside of the  |
| Water Quality Meter with flow through cell | Horiba U-22;<br>Horiba U-52;<br>Hanna 9828; YSI 556<br>MPS | \$100/day | \$300/week | Max allowable rates are for equipment owned by the consultant.<br>Costs for equipment that is rented from a company outside of the consultants firm can be recovered with receipts.                     |



|                  |  |           |            |  |
|------------------|--|-----------|------------|--|
| Submersible Pump |  | \$100/day | \$300/week | Max allowable rates are for equipment owned by the consultant.<br>Costs for equipment that is rented from a company outside of the |
| Peristaltic Pump |  | \$30/day  | \$120/week | Max allowable rates are for equipment owned by the consultant.<br>Costs for equipment that is rented from a company outside of the |

#### Materials and Supplies

| Disbursement Items  | Examples of Inclusionary items | Maximum Allowable Unit Rate | Variations | Remarks   |
|---|--------------------------------|-----------------------------|------------|---|
| Computer use, report PDF  |                                | no charge                   | no charge  | Overhead  |
| Faxes   |                                | no charge                   | no charge  | Overhead  |
| Final Reports - >5 copies of final report; black and white                |                                | \$0.15/pg                   |            | Regardless if printed in house or subcontracted |
| Final Reports - >5 copies of final report; colour                         |                                | \$1.00/pg                   |            | Regardless if printed in house or subcontracted |
| Final Reports Drawings and Plans - >5 copies & plans greater than 11 x 17 |                                | At Cost                     |            |   |
| Final Reports – CDs   |                                | no charge                   | no charge  | Overhead  |
| Final Reports - USB Keys  |                                | \$7/each                    |            |   |
| Pager, mobile phones (including long distance)                            |                                | no charge                   | no charge  | Overhead  |
| Courier/ Mail   |                                | no charge                   | no charge  | Overhead  |

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## **ANNEX C**

### **Security Requirements Check List (SRCL)**



Government of Canada  
Gouvernement du Canada

|  |
|--|
| Contract Number / Numéro du contrat<br>EQ447160412                   |
| Security Classification / Classification de sécurité<br>UNCLASSIFIED |

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

|  |  |  |
|--|--|--|
| <b>PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE</b>  |  |  |
| 1. Originating Government Department or Organization /<br>Ministère ou organisme gouvernemental d'origine<br>Public Works and Government Services<br>Canada  |  | 2. Branch or Directorate / Direction générale ou Direction<br>RPPTP                            |
| 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<br>ENVIRONMENTAL SERVICES  |  |  |
| 5. a) Will the supplier require access to Controlled Goods?<br>Le fournisseur aura-t-il accès à des marchandises contrôlées? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes<br>Non Oui  |  |  |
| 5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations?<br>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 <input type="checkbox"/> Yes<br>Non 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?<br>Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS?<br>(Specify the level of access using the chart in Question 7. c)<br>(Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c) <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes<br>Non 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.<br>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 <input checked="" type="checkbox"/> Yes<br>Non Oui |  |  |
| 6. c) Is this a commercial courier or delivery requirement with no overnight storage?<br>S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes<br>Non 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<br>Aucune restriction relative à la diffusion <input type="checkbox"/>   | All NATO countries<br>Tous les pays de l'OTAN <input type="checkbox"/> | No release restrictions<br>Aucune restriction relative à la diffusion <input type="checkbox"/> |
| Not releasable<br>À ne pas diffuser <input type="checkbox"/>   |  |  |
| Restricted to: / Limité à: <input type="checkbox"/>  | Restricted to: / Limité à: <input type="checkbox"/>                    | Restricted to: / Limité à: <input type="checkbox"/>  |
| Specify country(ies): / Préciser le(s) pays:   | Specify country(ies): / Préciser le(s) pays:                           | Specify country(ies): / Préciser le(s) pays:   |
| 7. c) Level of information / Niveau d'information  |  |  |
| PROTECTED A <input type="checkbox"/>   | NATO UNCLASSIFIED <input type="checkbox"/>                             | PROTECTED A <input type="checkbox"/>   |
| PROTECTED B <input type="checkbox"/>   | NATO NON CLASSIFIÉ <input type="checkbox"/>                            | PROTECTED B <input type="checkbox"/>   |
| PROTÉGÉ B <input type="checkbox"/>   | NATO RESTRICTED <input type="checkbox"/>                               | PROTÉGÉ B <input type="checkbox"/>   |
| PROTECTED C <input type="checkbox"/>   | NATO DIFFUSION RESTREINTE <input type="checkbox"/>                     | PROTECTED C <input type="checkbox"/>   |
| PROTÉGÉ C <input type="checkbox"/>   | NATO CONFIDENTIAL <input type="checkbox"/>                             | PROTÉGÉ C <input type="checkbox"/>   |
| CONFIDENTIAL <input type="checkbox"/>  | NATO SECRET <input type="checkbox"/>                                   | CONFIDENTIAL <input type="checkbox"/>  |
| CONFIDENTIEL <input type="checkbox"/>  | NATO SECRET <input type="checkbox"/>                                   | CONFIDENTIEL <input type="checkbox"/>  |
| SECRET <input type="checkbox"/>  | COSMIC TOP SECRET <input type="checkbox"/>                             | SECRET <input type="checkbox"/>  |
| SECRET <input type="checkbox"/>  | COSMIC TRÈS SECRET <input type="checkbox"/>                            | SECRET <input type="checkbox"/>  |
| TOP SECRET <input type="checkbox"/>  |  | TOP SECRET <input type="checkbox"/>  |
| TRÈS SECRET <input type="checkbox"/>   |  | TRÈS SECRET <input type="checkbox"/>   |
| TOP SECRET (SIGINT) <input type="checkbox"/>   |  | TOP SECRET (SIGINT) <input type="checkbox"/>   |
| TRÈS SECRET (SIGINT) <input type="checkbox"/>  |  | TRÈS SECRET (SIGINT) <input type="checkbox"/>  |

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité  
UNCLASSIFIED

Canada



Government of Canada  
Gouvernement du Canada

Contract Number / Numéro du contrat

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Security Classification / Classification de sécurité  
UNCLASSIFIED

**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 ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ 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

☒ RELIABILITY STATUS  
COTE DE FIABILITÉ

☐ CONFIDENTIAL  
CONFIDENTIEL

☐ SECRET  
SECRET

☐ TOP SECRET  
TRÈS SECRET

☐ TOP SECRET- SIGINT  
TRÈS SECRET - SIGINT

☐ NATO CONFIDENTIAL  
NATO CONFIDENTIEL

☐ NATO SECRET  
NATO SECRET

☐ COSMIC TOP SECRET  
COSMIC TRÈS SECRET

☐ SITE ACCESS  
ACCÈS AUX EMBLEMES

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 ☐ Yes  
Non ☐ Oui

If Yes, will unscreened personnel be escorted?

Dans l'affirmative, le personnel en question sera-t-il escorté? ☒ No ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ 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 ☐ Yes  
Non ☐ Oui

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Security Classification / Classification de sécurité  
UNCLASSIFIED

Canada



|  |
|--|
| Contract Number / Numéro du contrat<br>EQ447160412                   |
| Security Classification / Classification de sécurité<br>UNCLASSIFIED |

**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<br>Catégorie  | PROTECTED<br>PROTÉGÉ |   |   | CLASSIFIED<br>CLASSIFIÉ          |        |                               | NATO  |  |                |   | COMSEC               |   |   |              |        |                                     |
|--|----------------------|---|---|----------------------------------|--------|-------------------------------|---|--|----------------|---|----------------------|---|---|--------------|--------|-------------------------------------|
|  | A                    | B | C | CONFIDENTIAL<br><br>CONFIDENTIEL | SECRET | TOP SECRET<br><br>TRÈS SECRET | NATO<br>RESTRICTED<br><br>NATO<br>DIFFUSION<br>RESTREINTE | NATO<br>CONFIDENTIAL<br><br>NATO<br>CONFIDENTIEL | NATO<br>SECRET | COSMIC<br>TOP<br>SECRET<br><br>COSMIC<br>TRÈS<br>SECRET | PROTECTED<br>PROTÉGÉ |   |   | CONFIDENTIAL | SECRET | TOP<br>SECRET<br><br>TRÈS<br>SECRET |
|  |                      |   |   |                                  |        |                               |   |  |                |   | A                    | B | C |              |        |                                     |
| Information / Assets<br>Renseignements / Biens<br>Production |                      |   |   |                                  |        |                               |   |  |                |   |                      |   |   |              |        |                                     |
| IT Media /<br>Support TI                                     |                      |   |   |                                  |        |                               |   |  |                |   |                      |   |   |              |        |                                     |
| IT Link /<br>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 ☐ Yes  
Non 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 ☐ Yes  
Non 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 indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

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## ANNEX D - FORMS

NOTE TO OFFERERS: Please use the forms provided or submit your technical offer in the **same** format **and** with all the information requested. Four (4) hard copies and two (2) soft copies are required.

### BASIC INFORMATION

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Project:

1. Offeror's Procurement Business Number:

2. Firm's Legal Name:

3. Is this the ( ) Head Office OR ( ) Branch Office? (DO NOT use both)

4. Street Address:

5. Mailing Address:

City:

Prov./Terr./State:

Postal/ZIP Code:

City:

Prov./Terr./State:

Postal/ZIP Code:

6. Telephone Number:

7. Fax Number:

8. Provide the following information about the Firm:

9. List Office Locations in the Province of Ontario (by city, town, etc.):

Type of Organization:

Number of Employees:

( ) Sole Proprietorship

Graduate Scientists/Prof. Engineers:

( ) Partnership

Other Professionals:

( ) Corporation

Technical Support:

Year Established:

Other:

9. Preferred Language of Correspondence: ( ) English ( ) French

10. Please indicate the Stream number that your Firm is interested in:  
(Please complete a separate submission for each stream)

11. Senior Contact representing the Firm: (PRINT)

NAME:

CAPACITY:

TELEPHONE NUMBER:

FAX NUMBER:

E-mail:

**ANNEX D – FORM 1A**

**Form 1A - TEAM APPROACH AND MANAGEMENT OF SERVICES**

**Name of Firm:**

PROVIDE AN ORGANIZATION CHART **(On one sheet of paper, single-sided 8.5"x11")**

- Demonstrate the management and organization (including reporting structure for the key personnel)
- Identify office location for the key personnel



**ANNEX D – FORM 1B**

***Form 1B - TEAM APPROACH AND MANAGEMENT OF SERVICES***

**Name of Firm:**

PROVIDE (*On one sheet of paper, single-sided 8.5"x11"*):

- the roles and responsibilities of each team member;
- the firm's capability of providing required services. If sub-contractors are used, a description of the management plan to address roles and responsibilities and quality, schedule, and budget control;
- the assignment of the resources and availability of back-up personnel;



**ANNEX D – FORM 1C**

**Form 1C - TEAM APPROACH AND MANAGEMENT OF SERVICES**

**Name of Firm:**

PROVIDE ***(On one sheet of paper, single-sided 8.5"x11")***):

- the firm's approach to responding to the individual call-ups;
- the firm's depth of resources;
- quality assurance and quality control techniques;
- budget control techniques;
- schedule control techniques; and
- how the team intends to meet the 'Project Response Time Requirements' defined in RS 1.4 of the Required Services

**ANNEX D – FORM 2**

**Form 2 - PAST RELEVANT EXPERIENCE OF THE FIRM**

**Name of Firm:**

List 10 Projects demonstrating the full range of services described in the Statement of Work “ANNEX “A” for the applicable Stream.

**(Maximum 10 Projects; Maximum 1 page per project, single-sided 8.5”x11”)**

References may be contacted to assist in the evaluation of performance based on past Projects, with respect to budgets, schedules and quality of work

- Project Title,  
- Location (include Province),  
- Dollar Value,  
- Completion Year  
- List Federal / Provincial  
Departments / Ministries /  
Agencies involved  
- Name and Phone No. of  
Client Contact

- Brief Description of  
Project  
- Names of personnel  
involved and their  
respective responsibilities  
- Indicate success in  
providing project  
deliverables within stated  
quality, budget, and  
schedule requirements

Responsibility of Firm/Services  
Provided

(State if Project Carried Out in Joint  
Venture and respective  
responsibilities of each firm)

**ANNEX D – FORM 3A**

| Form 3A   |   |                          |           |               |                            |  |
|---|---|--------------------------|-----------|---------------|----------------------------|--|
| SUSTAINABILITY AND GREENING GOVERNMENT OPERATIONS |   |                          |           |               |                            |  |
| 3. CORPORATE CAPABILITY TABLE (Form 3A)           |   |                          |           |               |                            |  |
| #   | Specialization  | Name of Individual       | Education | Accreditation | Experience<br>(# of years) | Selected for detailed review in Part 4 |
| Senior Contact representing the firm              |   |                          |           |               |                            |  |
| 1   | Senior Contact  |                          |           |               |                            | No                                     |
| Senior Professional                               |   |                          |           |               |                            |  |
| 2   | <b>Senior Project Manager*</b>                                | <i>Include name only</i> |           |               |                            | Yes                                    |
| 3   | Senior Project Manager  |                          |           |               |                            | No                                     |
| 4   | Senior LEED Certified professional                            |                          |           |               |                            | No                                     |
| 5   | Senior Certified Environmental Auditor (ISO or CSA certified) |                          |           |               |                            | No                                     |
| 6   | <b>Senior Sustainability Specialist*</b>                      | <i>Include name only</i> |           |               |                            | Yes                                    |
| 7   | Senior Energy Assessor  |                          |           |               |                            | No                                     |
| 8   | Senior Indoor Working Environment/ Air Quality                |                          |           |               |                            | No                                     |
| Intermediate Professional                         |   |                          |           |               |                            |  |
| 9   | Project Manager   |                          |           |               |                            | No                                     |
| 10  | Project Manager   |                          |           |               |                            | No                                     |
| 11  | Environmental Consultant                                      |                          |           |               |                            | No                                     |

|                     |  |                          |  |  |  |            |
|---------------------|--|--------------------------|--|--|--|------------|
| 12                  | <b>LEED Certified professional*</b>                    | <i>Include name only</i> |  |  |  | <b>Yes</b> |
| 13                  | Energy assessor  |                          |  |  |  | No         |
| 14                  | Indoor Working Environment/ Air Quality                |                          |  |  |  | No         |
| 15                  | <b>Sustainable Building Specialist*</b>                | <i>Include name only</i> |  |  |  | <b>Yes</b> |
| 16                  | Environmental Consultant                               |                          |  |  |  | No         |
| 17                  | Certified Environmental Auditor (ISO or CSA certified) |                          |  |  |  | No         |
| 18                  | Environmental Consultant                               |                          |  |  |  | No         |
| Junior Professional |  |                          |  |  |  |            |
| 19                  | LEED Specialist  |                          |  |  |  | No         |
| 20                  | Environmental Consultant                               |                          |  |  |  | No         |
| 21                  | Energy assessor  |                          |  |  |  | No         |
| Senior Technologist |  |                          |  |  |  |            |
| 22                  | Senior Technician                                      |                          |  |  |  | No         |
| 23                  | CADD/GIS   |                          |  |  |  | No         |
| Technologist        |  |                          |  |  |  |            |
| 24                  | Field Technician                                       |                          |  |  |  | No         |
| 25                  | CADD   |                          |  |  |  | No         |
| Maximum Points      |  |                          |  |  |  | /          |

\*selected for further evaluation. See Form 4: *Detailed Qualifications of Key Personnel*

**Annex D - Form 3B - Qualifications of Personnel (from 3A Corporate Capability Table)**

Note: this form is mandatory and will be used to evaluate and award points in Form 3A.

Name of Firm: \_\_\_\_\_

One form is to be used per specialization (as identified in 3A Corporate Capability Table), i.e., 21 forms (4 key personnel to be evaluated in Form 4) on one side of 8.5" x 11" paper each.

|                |  |
|----------------|--|
| Specialization | (Identify specialization as per the Corporate Capability Table)  |
| Name,<br>Title | (First and last name, title at the firm)   |
| Education      | (Credentials, post-secondary education institution, dates attended)  |
| Accreditation  | (Accreditation, organization, year of accreditation obtained & current status)<br><br>Note: all acronyms must be spelt out and year must be given.   |
| Experience     | (Total years of relevant experience to the statement of work, work history with employers' name, dates employed, job title, responsibilities (beginning with the most recent). Experience refers to the number of years the individual has worked in the discipline relevant to the category specialization, and does not include time at school or time working in a different discipline.) |

#### ANNEX D - Form 4 – Detailed Qualifications of Key Personnel

Name of Firm: \_\_\_\_\_

**Each firm must include the 4 unique key personnel as identified on Form 3A as follows:  
(Note: personnel cannot be repeated in this section)**

- 1) Senior Project Manager
- 2) Senior Sustainability Specialist
- 3) LEED Certified Professional
- 4) Sustainable Building Specialist

**One form per person/ specialization Maximum two sides of 8.5" x 11" paper/ or two sheets of 8.5" x 11" paper single-sided per person/ specialization. 8 pages total.**

|                |  |
|----------------|--|
| Specialization | (Identify specialization as per the Corporate Capability Table)  |
| Name,<br>Title | (First and last name, title at the firm)   |
| Education      | (Credentials, post-secondary education institution, dates attended)  |
| Accreditation  | (Accreditation, organization, year accreditation obtained & current status)<br><br>Note: all acronyms must be spelt out and year must be given.  |
| Experience     | (Total years of relevant experience to the statement of work, work history with employers' name, dates employed, job title, responsibilities/tasks (beginning with the most recent). Experience refers to the number of years the individual has worked in the discipline relevant to the category specialization, and does not include time at school or time working in a different discipline.)<br><br>Must include <b>5 relevant projects</b> (only the first five projects will be considered). Include title, location (province), involvement, role, federal and provincial agencies involved, employers' name (key personnel's employer at the time of the project), dates employed, responsibilities (specifically on the project, beginning with the most recent). |

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**ANNEX E**

**SAMPLE CALCULATION OF AGGREGATE CHARGE-OUT RATE**

| <b>Category</b>                          | <b>Weighting Assigned</b> | <b>Hourly Charge-out Rate Year 1</b> | <b>Weighted Hourly Rate</b> |
|--|---------------------------|--------------------------------------|-----------------------------|
| Senior Contact Representing Firm         | 5%                        | \$100.00                             | \$ 5.00                     |
| Senior Professional                      | 20%                       | \$ 80.00                             | \$16.00                     |
| Intermediate Professional                | 20%                       | \$ 60.00                             | \$12.00                     |
| Junior Professional                      | 10%                       | \$ 50.00                             | \$ 5.00                     |
| Senior Technologist                      | 20%                       | \$ 65.00                             | \$13.00                     |
| Technologist                             | 20%                       | \$ 55.00                             | \$11.00                     |
| Admin. Support                           | 5%                        | \$30.00                              | \$1.50                      |
| <b>Year 1 Total Weighted Hourly Rate</b> |                           |                                      | <b>\$63.50</b>              |

An aggregate of the total weighted hourly rates for the first 2 years plus the 2 additional extensions (totalling 4 years) will be used to determine the rate that will be used in the best value calculation.

**Example:**

Year 1 - \$ 63.50  
Year 2 - \$ 64.13  
Ext. 1 - \$ 64.77  
Ext. 2 - \$ 65.42  
          \$257.82

The aggregate charge-out rate for evaluation purposes is \$257.82.