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Bid Receiving Public Works & Government
Services Canada/Réception des soumissions Travaux
publics et Services gouvernementaux Canada
1713 Bedford Row
Halifax, N.S./Halifax,(N.E.)
B3J 1T3
Halifax
Bid Fax: (902) 496-5016

SOLICITATION AMENDMENT

MODIFICATION DE L'INVITATION

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

Comments - Commentaires

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

Issuing Office - Bureau de distribution
Atlantic Region Acquisitions/Région de l'Atlantique
Acquisitions
1713 Bedford Row
Halifax, N.S./Halifax, (N.E.)
B3J 3C9
Halifax
Nova Scot

Title - Sujet Building Condition Report, Joe Ghiz	
Solicitation No. - N° de l'invitation ED011-171036/A	Amendment No. - N° modif. 001
Client Reference No. - N° de référence du client ED011-17-1036	Date 2016-08-16
GETS Reference No. - N° de référence de SEAG PW-\$PWA-203-5441	
File No. - N° de dossier PWA-6-76058 (203)	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2016-08-30	Time Zone Fuseau horaire Atlantic Daylight Saving Time ADT
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: MacDonald (PWA), Isabelle	Buyer Id - Id de l'acheteur pwa203
Telephone No. - N° de téléphone (902) 496-5168 ()	FAX No. - N° de FAX (902) 496-5016
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

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

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REQUEST FOR PROPOSAL (RFP)

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SUPPLEMENTARY INSTRUCTIONS TO PROPONENTS (SI)

SI1 INTRODUCTION

1. Public Works and Government Services Canada (PWGSC) intends to retain an individual consulting firm or joint venture to provide the professional services for the project as set out in this Request for Proposal (RFP).
2. This is a single phase selection process.
3. Proponents responding to this RFP are requested to submit a full and complete proposal. The proposal will cover not only the qualifications, experience and organization of the proposed Consultant Team, but also the detailed approach to the work, and the pricing and terms offered. A combination of the technical and price of services submissions will constitute the proposal.

SI2 PROPOSAL DOCUMENTS

1. All instructions, general terms, conditions and clauses identified in the RFP by number, date and title, are hereby incorporated by reference into and form part of this solicitation and any resultant contract.

All instructions, general terms, conditions and clauses identified in the RFP 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.

2. The following are the proposal documents:
 - (a) Supplementary Instructions to Proponents (SI);
R1410T (2016-04-04), General instructions (GI) – Architectural and/or Engineering services – Request for Proposal;
Submission Requirements and Evaluation (SRE);
 - (b) the general terms, conditions and clauses, as amended, identified in the Agreement clause;
 - (c) Project Brief / Terms of Reference;
 - (d) the document entitled "Doing Business with National Capital Area";
 - (e) any amendment to the solicitation document issued prior to the date set for receipt of proposals; and

(f) the proposal, Declaration/Certifications Form and Price Proposal Form.

3. Submission of a proposal constitutes acknowledgment that the Proponent has read and agrees to be bound by these documents.

SI3 QUESTIONS OR REQUEST FOR CLARIFICATION

Questions or requests for clarification during the solicitation period must be submitted in writing to the Contracting Authority named on the RFP - Page 1 as early as possible. Enquiries should be received no later than three (3) working days prior to the closing date identified on the front page of the Request for Proposal. Enquiries received after that date may not be answered prior to the closing date of the solicitation.

SI4 CANADA'S TRADE AGREEMENTS

This procurement is subject to the provisions of the North American Free Trade Agreement (NAFTA).

SI5 CERTIFICATIONS

1. Integrity Provisions – Declaration of Convicted Offences

In accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Proponent must **provide with its bid, as applicable**, to be given further consideration in the procurement process, the required documentation as per R1410T (2016-04-04), General instructions 1 (GI1), Integrity Provisions – Proposal, **section 3b**.

2. Federal Contractors Program for Employment Equity - Proposal Certification

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

Canada will have the right to declare a proposal non-responsive if the Proponent, or any member of the Proponent if the Proponent is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of contract award.

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SI6 - WEBSITES

The connection to some of the Web sites in the RFP is established by the use of hyperlinks. The following is a list of the addresses of the Web sites:

Employment Equity Act

<http://laws-lois.justice.gc.ca/eng/acts/E-5.401/index.html>

Federal Contractors Program (FCP)

http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/index.shtml

Certificate of Commitment to Implement Employment Equity form LAB 1168

<http://www.servicecanada.gc.ca/cgi-bin/search/eforms/index.cgi?app=profile&form=lab1168&dept=sc&lang=e>

Ineligibility and Suspension Policy

<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>

Code of Conduct for Procurement

<http://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/contexte-context-eng.html>

Lobbying Act

<http://laws-lois.justice.gc.ca/eng/acts/L-12.4/?noCookie>

Buy and Sell

<https://buyandsell.gc.ca/>

Supplier Registration Information

<https://srisupplier.contractscanada.gc.ca>

Consultant Performance Evaluation Report Form

<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/documents/2913-1.pdf>

Canadian economic sanctions

<http://www.international.gc.ca/sanctions/index.aspx?lang=eng>

National Joint Council (NJC) Travel Directive

<http://www.njc-cnm.gc.ca/directive/travel-voyage/index-eng.php>

TERMS, CONDITIONS AND CLAUSES

AGREEMENT

1. The Consultant understands and agrees that upon acceptance of the offer by Canada, a binding Agreement shall be formed between Canada and the Consultant and the documents forming the Agreement shall be the following:
 - (a) the Front Page and this Agreement clause;
 - (b) the General Terms, Conditions and Clauses, as amended, identified as:
 - R1210D (2016-04-04), General Condition (GC) 1 - General Provisions – Architectural and/or Engineering Services
 - R1215D (2016-01-28), General Condition (GC) 2 - Administration of the Contract – Architectural and/or Engineering Services
 - R1220D (2015-02-25), General Condition (GC) 3 - Consultant Services
 - R1225D (2015-04-01), General Condition (GC) 4 - Intellectual Property
 - R1230D (2016-01-28), General Condition (GC) 5 - Terms of Payment – Architectural and/or Engineering Services
 - R1235D (2011-05-16), General Condition (GC) 6 - Changes
 - R1240D (2011-05-16), General Condition (GC) 7 - Taking the Services Out of the Consultant's Hands, Suspension or Termination
 - R1245D (2016-01-28), General Condition (GC) 8 - Dispute Resolution – Architectural and/or Engineering Services
 - R1650D (2015-02-25), General Condition (GC) 9 - Indemnification and Insurance
 - (c) Supplementary Conditions
 - (d) Agreement Particulars
 - (e) Project Brief / Terms of Reference;
 - (f) the document entitled "Doing Business with National Capital Area";
 - (g) any amendment to the solicitation document incorporated in the Agreement before the date of the Agreement;
 - (h) the proposal, the Declaration/Certifications Form and the Price Proposal Form.
2. The documents identified above by title, number and date are hereby incorporated by reference into and form part of this Agreement, as though expressly set out herein, subject to any other express terms and conditions herein contained.

The documents identified above by title, number and date are set out in the Standard Acquisition Clauses and Conditions (SACC) Manual, issued by Public Works and Government Services Canada (PWGSC). The SACC Manual is available on the PWGSC Web site: <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>

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3. If there is a discrepancy between the wording of any documents that appear on the following 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) any amendment or variation in the Agreement that is made in accordance with the terms and conditions of the Agreement;
 - (b) any amendment to the solicitation document incorporated in the Agreement before the date of the Agreement;
 - (c) this Agreement clause;
 - (d) Supplementary Conditions;
 - (e) General Terms, Conditions and Clauses;
 - (f) Agreement Particulars;
 - (g) Project Brief / Terms of Reference;
 - (h) the document entitled "Doing Business with National Capital Area";
 - (i) the proposal.

SUPPLEMENTARY CONDITIONS (SC)

SC1 SECURITY REQUIREMENT

There is no security requirement applicable to this Agreement.

AGREEMENT PARTICULARS

The Agreement Particulars will be issued at time of award of contract and will identify the fee to be paid to the Consultant for the services determined in the Price Proposal Form.

SUBMISSION REQUIREMENTS AND EVALUATION

SRE 1 GENERAL INFORMATION

1.1 Reference to the Selection Procedure

An 'Overview of the selection procedure' can be found in R1410T General instructions to Proponents (GI3).

1.2 Calculation of Total Score

Not applicable to this solicitation.

SRE 2 PROPOSAL REQUIREMENTS

2.1 Requirement for Proposal Format

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

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

2.2 Specific Requirements for Proposal Format

The maximum number of pages (including text and graphics) to be submitted for the Rated Requirements under SRE 3.2 is five (5) pages.

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

- Covering letter
- Consultant Team Identification (Appendix C)
- Declaration/Certifications Form (Appendix D)
- Integrity Provisions – Required Documentation
- Front page of the RFP

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- Front page of revision(s) to the RFP
- Price Proposal Form (Appendix E)

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

SRE 3 SUBMISSION REQUIREMENTS AND EVALUATION

3.1 MANDATORY REQUIREMENTS

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

3.1.1 Licensing, Certification or Authorization

The proponent shall be an architect, licensed to provide the necessary professional services to the full extent that may be required by provincial or territorial law in the province of Prince Edward Island.

3.1.2 Consultant Team Identification

The consultant team to be identified must include the following:

Proponent (prime consultant) - Architectural
Key Sub-consultants / Specialists – Mechanical, Electrical, Structural, Vertical Transportation.

If the proponent proposes to provide multidisciplinary services that might normally be provided by a sub-consultant, this should be indicated here.

Information required - name of firm, key personnel to be assigned to the project. For the prime consultant indicate current license and/or how you intend to meet the provincial or territorial licensing requirements. In the case of a joint venture identify the existing or proposed legal form of the joint venture (refer to R1410T General instructions to Proponents, GI9 Limitation of submissions).

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

3.1.3 Declaration/Certifications Form

Proponents must complete, sign and submit the following:

- Appendix D, Declaration/Certifications Form as required.

3.1.4 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 Proponent must provide, **as applicable**, to be given further consideration in the procurement process, the required documentation as per R1410T (2016-04-04), General instructions 1 (GI1), Integrity Provisions – Proposal, **section 3a**.

3.2 RATED REQUIREMENTS

3.2.1 Understanding of the Project:

The proponent should demonstrate understanding of the goals of the project, the functional/technical requirements, the constraints and the issues that will shape the end product.

Information that should be supplied:

- Consultant Team understanding of the functional and technical requirements
- Consultant Team understanding of the Significant issues, challenges and constraints
- Consultant Team examples of Building Condition Reports – Performance Audits completed within the last five years.

3.2.2 Scope of Services:

The proponent should demonstrate capability to perform the services and meet project challenges and to provide a plan of action.

Information that should be supplied:

- Consultant Team Work Plan/Work Breakdown Structure – breakdown of work tasks and deliverables.
- Scope of Services - detailed list of services

3.3 EVALUATION AND RATING

In the first instance, price envelopes will remain sealed and only the technical components of the proposals which are responsive will be reviewed, evaluated and rated by a PWGSC Evaluation Board in accordance with the following to establish Technical Ratings:

Criterion	Weight Factor	Rating	Weighted Rating
Understanding of the Project	7.0	0 - 10	0 - 70
Scope of Services	3.0	0 - 10	0 - 30
Technical Rating	10.0		0 - 100

Generic Evaluation Table

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

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

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

To be considered further, proponents **must** achieve a minimum Technical Rating of sixty (60) points out of the hundred (100) points available as specified above.

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

SRE 4 PRICE OF SERVICES

All price proposal envelopes corresponding to responsive proposals which have achieved the pass mark of fifty (60) points will be opened upon completion of the technical evaluation. An average price is determined by adding all the price proposals together and dividing the total by the number of price proposals being opened.

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

The remaining price proposals are rated as follows:

The lowest price proposal will be the winning proposal.

SRE 5 TOTAL SCORE

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Not applicable

SRE 6 SUBMISSION REQUIREMENTS - CHECKLIST

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

Please follow detailed instructions in R1410T General instructions to Proponents, GI16 Submission of proposal. Proponents may choose to introduce their submissions with a cover letter.

- ☐ Team Identification - see typical format in Appendix A
- ☐ Declaration/Certifications Form - completed and signed - form provided in Appendix B
- ☐ Integrity Provisions – Required documentation – **as applicable** in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per R1410T (2016-04-04), General instructions 1 (GI1), Integrity Provisions – Proposal, **section 3a.**
- ☐ Integrity Provisions - Declaration of Convicted Offences – **with its bid, as applicable** in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per R1410T (2016-04-04), General instructions 1 (GI1), Integrity Provisions – Proposal, **section 3b.**
- ☐ Proposal - one (1) original plus three (3) copies
- ☐ Front page of RFP
- ☐ Front page(s) of any solicitation amendment

In a separate envelope:

Price Proposal Form - one (1) completed and submitted in a separate envelope

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Appendix A – Project Brief

PR 1 PROJECT DESCRIPTION

PR 1.1 Project Information

PR 1.1.1 PSPC Project Title: VFA Facility Condition Assessment – JAG Building

PR 1.1.2 Facility Name and Location of Project: Joseph A. Ghiz Building – Summerside, PEI

PR 1.1.3 PSPC Project Number: R.083779.011

PR 1.1.4 Client Department: PSPC

PR 1.2 PSPC Project Team

PR 1.2.1 PSPC Project Manager: Phone

PR 1.2.2 Senior Project Manager: Phone:

PR 1.2.3 Design Manager (RTL): Phone

PR 1.2.4 Senior Design Manager: Phone

PR 1.2.5 Property Manager: Phone

PR 1.2.6 Project Leader: Phone

PR 1.2.7 Interior Designer: Phone

PR 1.2.8 Senior Interior Designer: Phone:

PR 1.2.9 Civil Resource: Phone:

PR 1.2.10 Structural Resource: Phone:

PR 1.2.11 Mechanical Resource: Phone:

PR 1.2.12 Electrical Resource: Phone:

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PR 1.3 Project Outline

PR 1.3.1 Purpose of the Project

To develop a level 2 building condition report that sets a good baseline document with detailed technical and financial information required to maintain the asset in operating condition during a project 20 year window.

PR 1.3.2 Project History Synopsis

N/A

PR 1.3.3 Detailed Scope of Work

PSPC has a requirement for the implementation of Level 2 Facility Condition Assessment (FCA) at the Joseph A. Ghiz Building in Summerside, Prince Edward Island.

In general, a FCA is an assessment of the condition of the components and recommended actions required to maintain the asset in operating condition during the next 20 years. The FCA covers all components on the asset, including the site and buildings. Systems that are common to all buildings include:

- Site related components;
- Architectural related components;
- Structural components;
- Vertical transportation;
- Mechanical components, and;
- Electrical components

The general scope of services of this project is to undertake the work required to provide a concise and comprehensive assessment of site, buildings, building systems, and building elements of PSPC real property assets, including life cycle costing (class "D" estimates). The scope of services includes:

- Gathering historic information about the facility, such as year constructed, major renovations and/or additions, previous reports and drawings;
- Record observations of specific site, building, building system, and elements;
- Analyze the information to identify the condition of the facility, work required to maintain the facility at a level of quality appropriate to the intended function of the facility, and the life cycle cost (class "D" estimates);

FCA data will be captured using VFA Surveys. VFA surveys use a preconfigured internet-based FCA survey to capture building condition information in the field VIA mobile devices or on desktop computers.

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The work shall be carried out based on the terms, conditions and requirements stipulated within the Terms of Reference (TOR) supplied with the solicitation package. The final reports for the assets shall act to reasonably articulate component condition, events, and other relevant information pertaining to the site, base buildings and the fit-up spaces.

Based on the required package of work and a visual review of the site, the consultant shall submit to PSPC any findings for the need to implement additional studies, and all associated costs. PSPC will review the findings in consultation with the service provider and the P&TS Centre of Expertise in order to select the most cost effective & prudent decision as it relates to the critical assessment of the Asset.

As part of the assessment, the Consultant and sub-consultants, shall obtain relevant asset information by attending the initial meetings, via teleconference calls, planned with the Project

Manager, Operational staff, P&TS Centre of Expertise specialists and other PSPC stakeholders to provide relevant input. Discussions should be limited to information related to technical deficiencies and areas of perceived improvement to the building performance. This technical input is imperative to the success of this FCA assessment.

The objective of a **level 2** Building Condition Report is to investigate the identified various buildings and related site improvement factors including:

- Component condition and assessment of remaining life,
- Equipment obsolescence,
- Design problems and deficiencies that adversely affect operation and maintenance activities,
- Impact of compliance with Treasury Board Secretariat temperature, humidity and ventilation standards,
- Workstation density maximums imposed by design limitations of the applicable fit-up standard. (Currently Workplace 2.0).
- Compliance with the latest edition / revision of all applicable standards & codes (including, but not limited to: Health, Fire, Life Safety Codes, National Building Code, Electrical Safety Program)
- Compliance with local by-laws,
- Effective age and remaining economic life of building components,
- Confirmation of regulatory testing,
- Functionality/Serviceability Assessment

In satisfying the deliverables listed in this document, it is also imperative that the Consultant ensures implementation of the following services:

- The strict adherence to the implementation and scheduling plan as provided under the PD in consultation with the assigned Departmental Representative
- Assistance to the Departmental Representative in Risk identification and Mitigation.
- Support to the Departmental Representative who shall be responsible for leading, monitoring, controlling the timely provision of final project deliverables to the Stakeholders of the Asset.

PR 1.3.4 Site Conditions

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The consultant shall at all times comply with the applicable Provincial/Federal Electrical,

Construction, Fire Codes, Acts, Standards and Guidelines. Additionally, at all times comply with Provincial Health & Safety Acts, and Regulations, in addition to the requirements of Canada Occupational Safety and Health Regulations, and Canada Labour Code.

PR 1.3.5 Implementation Strategy (Issues/Constraints/Challenges/Opportunities/Training)

- Available as-built drawings will be provided where they exist. The drawings of the original structure may not be available electronically.
- Previous reports or studies are available and will be provided by the PM but may take some time to be gathered together.
- Training on the use of VFA auditor will be provided upon award of the contract if required by the departmental representative.

PR 1.3.6 Consultant Access to the Site

For general access the consultant will be required to conduct site related work Monday to Friday between 8am and 4:30pm. All other access times will be determined by consultation with the departmental representative. The consultant shall pre-arrange dates & times for site access at least 72 hours in advance.

PR 1.4 Budget (Order of Magnitude Estimate)

N/A

PR 1.5 Schedule

Draft reports - to be submitted within (8) weeks after award of contract.

Final reports - to be submitted within (1) weeks of receipt of PSPC draft review comments.

PR 1.6 Existing Documentation

A limited number of architectural, mechanical and electrical drawings can be provided to the selected consultant during on-site inspections. PSPC will transfer all available drawings and studies as requested by the consultant.

PR 2

GENERAL PROJECT OBJECTIVES

The following tables indicate which GPO's will apply to this project:

GPO 1 General Project Objectives (GPO)

GPO 1.1	Design Principles – General	Included
GPO 1.2	Sustainable Development	Included
GPO 1.3	Code Compliance	Included

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GPO 1.4	Risk Management	Included
GPO 1.5	Health and Safety	Included
GPO 1.6	PSPC Standards & Procedures	Included

GPO 2 Issues

GPO 2.1	Major Cost Issues	Not Included
GPO 2.2	Major Time Issues	Not Included
GPO 2.3	Major Operational Issues	Not Included

Project Administration – PA

The requirements for Project Administration are stated in the Supply Arrangement Agreement and are included for this call-up by reference to the Supply Arrangement Agreement.

Required Services – RS

Architectural Assessments	Required
Mechanical Assessments	Required
Electrical Assessments	Required
Structural Assessments	Required
Vertical Transportation Assessments	Required
Cost Planner and Estimating Specialists	Not Required

The detailed requirements for services and deliverables are stated in the Supply Arrangement Agreement and are not repeated in this text; however, the following services are required and are included by reference.

RS 1.0	Building Condition Reports - Performance Audits	Required
---------------	--	----------

PR 3 HEALTH AND SAFETY PLAN

Health and Safety Plan

- .1 Prior to commencement of Work, develop written Health and Safety Plan specific to the Work. Implement, maintain, and enforce Plan for entire duration of Work and until final demobilization

from site.

.2 Health and Safety Plan shall include the following components:

- .1 List of health risks and safety hazards identified by hazard assessment.
- .2 Control measures used to mitigate risks and hazards identified.
- .3 On-site Contingency and Emergency Response Plan as specified below.
- .4 On-site Communication Plan as specified below.

.3 On-site Contingency and Emergency Response Plan shall include:

- .1 Operational procedures, evacuation measures and communication process to be implemented in the event of an emergency.
- .2 Evacuation Plan: prior to entering the Work Site confirm escape routes, marshalling areas, and location of fire fighting equipment.
- .3 Emergency Contacts: name and telephone number of officials from:
 - .1 Departmental Representative.
 - .2 Pertinent Federal and Provincial Departments and Authorities having jurisdiction.
 - .3 Local emergency resource organizations.
- .4 Harmonize Plan with Facility's Emergency Response and Evacuation Plan. Departmental Representative will provide pertinent data including name of PSPC and Facility Management contacts.

.4 On-site Communication Plan:

- .1 Procedures for sharing of work related safety information to
Sub consultants, including emergency and evacuation measures.
- .2 List of critical work activities to be communicated with Facility Manager
which have a risk of endangering health and safety of Facility users.

.5 Address all activities of the Work including those of sub consultants.

.6 Review Health and Safety Plan regularly during the Work. Update as conditions warrant to address emerging risks and hazards, such as whenever a new sub consultant arrives at Work Site.

.7 Departmental Representative will respond in writing, where deficiencies or concerns are noted and may request re-submission of the Plan with correction of deficiencies or concerns.

GENERAL PROJECT OBJECTIVES (GO)

- GPO 1.1 General Objectives**
- GPO 1.2 Roles and Responsibilities**
- GPO 1.3 Coordination with PSPC**
- GPO 1.4 Consultant Team Coordination**

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GPO 1.5 Project Response Time

REQUIRED SERVICES (RS)

RS 1.0 Building Condition Reports and Performance Audits (REQUIRED)

GO-1 GENERAL OBJECTIVES (GO)

GO 1.1 General Objectives

- 1.1.1 The services will support the PSPC Atlantic Region Real Property Services Branch. The contract includes one or more of the Required Services as listed in the RS's.
- 1.1.2 All services must be complete with the consultant team ready to identify all major issues that will have a significant impact on the project. This project requires the engagement of Architectural - Structural – Mechanical – Electrical – Vertical Transportation consultants to complete the work.
- 1.1.3 For RS 1 to 4 only, the *Consultant* will be required to:
 - .1 Chair project status meetings and prepare and distribute minutes within five working days of the meetings.
- 1.1.4 When client requested changes alter the scope of work or add to the cost of the project, and/or the cost of services, request approval of the Departmental Representative prior to incorporation in the design.
- 1.1.5 Provide deliverables via electronic format.
- 1.1.6 All documents (drawings and specification) are to be produced in accordance with Appendix E "Doing Business with A&ES" and at the appropriate project delivery stages.

GO 1.2 Roles and Responsibilities

1.2.1 Departmental Representative

- .1 The PSPC Departmental Representative, has overall responsibility for the progress of the project, including management, administration and coordination of the activities, as set out in this Document.
- .2 PSPC will review all respects of the Consultant Team's work on a continuing basis to determine the validity and completeness of the information provided. In the event PSPC may identify areas of concern including errors and omissions as well as areas of inadequate detail or areas that require further explanation, the Consultant Team shall re-examine the documents provided and make such revisions as are subsequently agreed to be necessary and/or provide ample acceptable evidence that such corrections or amendments are unnecessary.
- .3 **At the end of the contract, a Consultant Performance Evaluation Report Form (CPERF) will be prepared. Consultants with unsatisfactory reports may be prevented from participation in future proposals until PSPC is assured that relevant corrective steps have been taken.**

1.2.2 Consultant

- .1 Be responsible for the assembling and engagement of the complete design team required to carry out the work in a conscientious and professional manner.

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- .2 Be responsible for gathering, identifying and documenting the needs of the client department and incorporating those needs into the required project deliverables.
- .3 Deliver the project within the time frame and assigned budget in accordance with the approved plan.
- .4 Coordinate project requirements with any other current and planned projects work that may be underway.
- .5 **No acceptance by PSPC, whether expressed or implied, shall be deemed to relieve the Consultant, of professional or technical responsibility for the correctness or completeness of any element of the project.**

GO 1.3 Coordination with PSPC

- 1.3.1 Carry out services in accordance with approved documents and directions given by the *Departmental Representative*.
- 1.3.2 Correspond only with the *Departmental Representative* at the times and in the manner dictated by the *Departmental Representative*. Do not communicate with the client department unless so authorized in writing by the *Departmental Representative*.
- 1.3.3 Ensure all communications carry the PSPC's Project Title, Project Number and File Number.
- 1.3.4 Advise the *Departmental Representative* of any changes, which may affect schedule or budget or are inconsistent with instructions or written approvals previously given. Detail the extent and reasons for the changes and obtain written approval before proceeding.
- 1.3.5 Note that depending on the type of project, PSPC may dictate input into the project via in house resources, or other PSPC consultants and this prime consultant is to incorporate and coordinate these "subs" in the prime consultant's team for that project. Further, this Prime Consultant and all Subs will be required to sign and seal all documents that it prepares as required by the Province of the work and or its' municipalities.

GO 1.4 Consultant Team Coordination

- 1.4.1 The Architectural Consultant is considered as the Prime Consultant and will be responsible for coordination of all sub-consultant work prior to document submission at the various project stages.

GO 1.5 Project Response Time

- 1.5.1 N/A

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REQUIRED SERVICES (RS)

To be read in conjunction with the Project Description (PD) document, which explains the level of effort required for each section. Both documents represent the total scope of work.

RS 1.0 Building Condition Reports and Performance Audits

RS 1.1 Required Resources

Full services are required from the following members of the consultant's team:

Mechanical:	(Required)
Electrical:	(Required)
Structural:	(Required)
Architectural:	(Required)
Vertical Transportation:	(Required)

The preparation of the building condition report requires an objective & subjective analysis of the asset(s) under consideration. Therefore in order to produce the final reports the forgoing engineering services shall be applied to the following five key areas.

1. Analysis Phase
2. Research Phase
3. Survey Phase
4. Report Development Phase
5. Data Base Phase

RS 1.2 Mechanical Requirements

Survey, report development, costing and FCA data base entry. **(Required)**

RS 1.3 Electrical Requirements

Survey, report development, costing and FCA data base entry. **(Required)**

RS 1.4 Structural Requirements

Survey, report development, costing and FCA data base entry. **(Required)**

RS 1.5 Architectural Requirements

Survey, report development, costing and FCA data base entry. **(Required)**

RS 1.6 Vertical Transportation Requirements

Survey, report development, costing and FCA data base entry. **(Required)**

APPENDIX B – TERMS OF REFERENCE

Description of Services - Project Administration

(PA)

Brief

1. Building Condition Report (BCR level-2) Terms of Reference
2. Appendix I - Capital versus Repair
3. Appendix II - Requirement Classification

Reference Framework for the Preparation of Building Condition Reports (BCR)

1 Building Condition Report (BCR level-2) Terms of Reference

1.1 Background

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

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

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

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

1.2 Building Condition Report - The New Approach

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

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

within the PSPC environment. While not all BCRs exist in CAPS for our crown portfolio most have been migrated. CAPS has been sold, and has been replaced by an application suite known as VFA. VFA will be populated with all existing BCR data.

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

1.3 VFA Surveys

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

To access the VFA Survey in Auditor, the user simply enters a custom URL into either a mobile device or desktop browser. Accessing Facility is not permitted for survey changes. Using the Auditor Tool is the only method for entry to ensure all pertinent details are not over written. Should a user gain access and make changes within facility, an audit trail will be run and responsible individual would have to recover data at own cost. User assigned surveys can then be "checked-out" to the desired medium, completed offline, "checked-in", and then submitted for approval". A designated "approver"¹ is automatically notified that a survey awaits their attention. Following the approval, the asset will be updated with the BCR survey data. In the case of a rejected survey, the assessor will be automatically notified with details of the areas that require corrective action. The cycle will continue until the survey approver accepts the survey. National Centre of Expertise (NCOE) will selectively audit approved surveys in the VFA application to validate administrative completeness.

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

1.4 General BCR Requirements

This Terms of Reference (TOR), describes the work required to complete a BCR. In general a BCR-Level II, is a visual assessment of the condition of the systems and recommended actions required to maintain the asset in operating condition during a projected 20-years. The BCR covers all systems on-site and in the asset organized as follows:

1. A – Substructure
2. B – Shell
3. C – Interiors
4. D – Services
5. E – Equipment and Furnishings
6. F – Special Construction and Demolition

7. G – Building Site work

¹ The approver is a PSPC official. Traditionally a BCR SME and or the Asset Manager or Technical Authority.

There are multiple levels of reporting available to establish the current status of the building. Level 1 BPR, level 2 general BCR and another is a specifically detailed level 3 investigation (stand-alone) which can be a sub-set of the same process to create the overall BCR. Once the objectives of the BCR are established, there will be a clear indication of the elements to be completed within the level 2 and what level 3 reporting information that will be available for inclusion in the BCR.

The objective of a level-2 BCR is to investigate various building and site improvement factors that may include: system condition and assessment of remaining life

- To assess the condition and remaining life of systems;
- To identify system obsolescence;
- To determine and estimate the effective age of systems;
- To identify design problems and deficiencies observed that adversely affect operation and maintenance activities;
- Impact of compliance with Treasury Board Secretariat temperature, humidity and ventilation standards;
- To determine workstation density maximums imposed by design limitations;
- To identify compliance concerns observed with the latest edition/revision of applicable standards & codes including, but not limited to: Health, Fire, Life Safety Codes, National Building Code
- To identify compliance concerns observed with pertinent local by-laws;
- Confirmation of regulatory testing;
- Other level-3 studies (stand-alone);
 - Functionality/Serviceability Assessment (FSA) (see **1.7.3.4**) ;
 - Accessibility Audit (see **4.0**);
 - Seismic screening/assessment) (see **5.0**);

The intent of the level 2 BCR is to identify the requirements to bring an asset to a BOMA Class-B level of accommodation and to maintain that level throughout a 20-year planning horizon. If an asset is at the BOMA Class-A level of accommodation then the level to be maintained during the 20-year planning horizon is Class-A (BOMA definition). The concept of full life-cycle costing for the facility is the basis for the development of the long-term capital plan. The 20-year capital plan should indicate the optimal timing/grouping of recommended requirements in order to minimize overall cost and tenant disruption.

1.4.1 Twenty-Year Window of Capital and Repair Requirements

Prior to the use of the CAPS, BCRs have always had a 25-year planning horizon. Since the PSPC BCR data is kept up to date through yearly data entry, the 25-year horizon would only be valid for one year. The number of years of valid planning data available reduces by one year for every year since the last BCR. To ensure PSPC continues to have valid 25-year forecasts of requirement costs during the five years between BCRs, PSPC now has a 20-year planning horizon.

1.4.2 System List

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

1.4.3 Validation of the System List

The VFA Survey for any building contains a system list specific to that building and site improvements. To ensure the BCR will cover the entire building, the first task in preparing a BCR shall be to validate the existing system list. The existence of each system in the list shall be confirmed by visual confirmation at the building and site. Use the master system list in VFA Survey as a guide to establishing the granularity to which the building will be broken down. Systems in this list, but not found in the building shall be deleted. If you delete a system that has a repair requirement associated to it, you will need to go into the requirement, add the prefix "delete" and then close the requirement. VFA doesn't have the ability to delete repair requirements in the auditor tool therefore a quarterly process will be established to remove those requirements that should have actually been removed.

1.4.3.1 Inventory Validation: System Creation, Deletion & Modification

Systems are defined by specific properties such as; Year Installed, Lifetime, Remaining Years, Unit Cost, and Quantity. The assessor will adhere to the following national business rules for modifying the properties of the System inventory, and in turn defining System-Renewal Requirements;

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

cannot be split over multiple years. Where a system renewal is expected to exceed one year, it will be deferred until completion.

1.5 Systems

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

1.5.2 Required System Photographs

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

- Asset - front of the asset (See 1.7.2 for more details)
- G2044 Signage
- G2020 Parking Lots
- B2010 Exterior Walls (Typically a photo of each elevation)
- B30 Roofing (Typically a photo of each type of roof and roofing material used)
- D3021 Boilers
- D3045 Chilled Water Distribution
- D3091 Special Cooling Systems & Devices
- D3060 Controls & Instrumentation
- D2023 Domestic Water Supply Equipment
- D5010 Electrical Service & Distribution
 - Primary Switch Gear
 - Primary Transformer & Vault
 - Secondary Service Electrical
 - Secondary Switchgear
 - Secondary Transformer
 - Distribution Panels
- D5021 Branch Wiring Devices (typical, not one of each)
- D5022 Lighting Equipment (typical, not one of each)
- Cafeteria (link these photos to the asset)
- Lobby – all four sides, ceiling and floor (link these photos to the asset)
- Washrooms (typical, not one of each) (link these photos to the asset)

These photographs, must be .JPG or .JPEG files and less than 2 MB as well as those specified elsewhere in this document. VFA Auditor includes advanced Photo Management functionality allowing users to link multiple photos to an Asset, System, and Requirements. Users have the option to link photos directly from a mobile device camera (iPad only at this time) or select from a camera roll or photo folder. Position the subject matter in the photo as

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such that it is close enough to clearly present the required details of the component and the issue, if any, yet show surrounding detail so that the photo location can be confirmed.

1.5.3 System Details

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

- System Name
- Year Installed
- Lifetime
- Years Remaining
- Inspection Date
- Condition Rating
- Quantity
- Replacement Cost
- Adjustment Factor

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

1.5.3.1 System Name

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

1.5.3.2 Year Installed

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

1.5.3.3 Lifetime

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

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nature of the particular component. To maintain data consistency across all sites, do NOT change the lifetime.

The Years Remaining that is shown is based on the Year Installed (before any updates). If you've changed the Year Installed, tap on the "Calculate" button.

1.5.3.4 Years Remaining

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

1.5.3.5 Condition Rating

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

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

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

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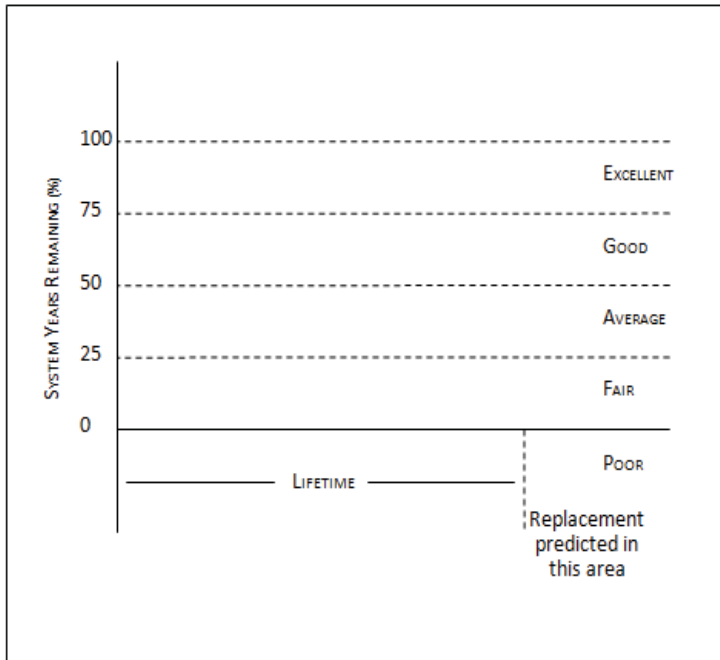
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Note: Percentages at the boundaries between two conditions shall link to the condition below the boundary. (E.g. 50% of life remaining would imply average condition).



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

1.5.3.6 Quantity

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

1.5.3.7 Replacement Cost

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

1.5.4 System Description

There is one system level description field associated with each system. If a narrative already exists, then it shall be reviewed and modified to reflect the current situation. This description

field has a character limitation of 4,000 characters therefore narratives should be brief, concise and current to reflect BCR assessment.

1.5.4.1 Description

The assessors are required to include the following information in their description of the system.

- Basic Description (i.e. make/model);
- The location of the system;
- The quality of the system (above average, average, below average);
- The capacity or performance of the system;
- System Condition and Anticipated Replacement Date
- An assessment of the impact of each of the systems deficiencies on the system's lifetime;
- Quality and service conditions that will lengthen or shorten the system's lifetime, for example;
 - i. Below average quality system;
 - ii. Design;
 - iii. No longer supported by the supplier;
 - iv. Inadequate maintenance;
 - v. Inadequate performance;
 - vi. Damage from external sources.
- The rationale for system's condition rating (Excellent, Good, Average, Fair or Poor);
- The year the system was last replaced and establishment of the next replacement date;
- An overview of the system's condition and recommendations/predictions for future repair and replacement projects. (Details of these projects will be described within the Requirement description narrative field).

1.5.4.2 BPR Description & BPR Rating

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

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

1.6 Requirements

Once the process of evaluating a system's condition has been completed, the recommended repair requirements shall be entered into (or modify existing requirements) in the VFA Survey. A "Requirement" is the name given to a recommended action to repair or replace a system. In a BCR, requirements shall be classified by type so that various building performance metrics can be calculated and the status of government programs can be ascertained. Requirements are typically grouped together into projects that will be integrated into the AMPs strategic priorities, and implemented once funding is secured.

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

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

1.6.1 Requirement Category

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

The requirement structure as noted in Appendix II is;

- Integrity
 - Lifecycle
 - Reliability
- Optimization
 - Abandoned
 - Capacity
 - Energy
 - Maintenance

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- Mission
- Sustainability
- Technological Improvements

Regulatory

- Accessibility
- Building Code
- HazMat
- Life Safety

1.6.2 Required Requirement Photographs

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

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

1.6.3 Requirement Details

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

1.6.3.1 Name

This name field is used in spreadsheet reports and shall identify the system affected by the issue, provide a brief description, preferably no more than 100 characters (e.g. replace roof, repair boiler, etc.). This field should be used to identify any potential code or Health and Safety considerations.

1.6.3.2 Priority, Recommended Action Date & Inspection Date

Each non-renewal Requirement must be assigned a Priority that indicates its time criticality. Its value will interact with inspection date to automatically populate the "Recommended Action Date" in VFA facility. Renewal Requirement priorities are set as read-only, and are automatically assigned based on their parent system's remaining life. A Renewal requirement will not be created in VFA Facility until the remaining life of the system is 20 years or less.

Priority values are 1 to 9, indicating how many years from the last inspection that the repair will be required and "Not time critical" which indicates that the repair to the system will be required but in 10 or more years. For example, a priority value of 3 will set the Recommended

Action Date to three years from the "Inspection Date". Inspection Date is a read-only field that is automatically populated when a Requirement is created or modified.

Override Action Date should only be used if a repair needs to be scheduled for a specific date 10 or more years in the future. Once the Override Action Date is set it supersedes any "Recommended Action Date" set using the Priority and "Inspection Date".

1.6.3.3 Unit Cost, Units & Quantity

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

For new Requirements the assessor will enter the Quantity, Units and Unit Cost. The Estimated Cost is read-only and will automatically populate based on the multiplication of the Quantity and Unit Cost. The assessor will ensure the cost estimate is location specific, and includes a construction contingency equal to 15% of the base costs, and an amount to cover project soft costs/fees of 30%. The assessor can use the adjustment factor to modify costs.

1.6.4 Requirement Descriptions

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

1.6.4.1 Description

The following information shall be included in every Requirement description:

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

1.6.4.2 Implication of Requirement Deferral

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

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

1.6.5 Closing a Completed Requirement

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

1.7 Asset Data Requirements

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

1.7.1 Asset Details

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

1.7.2 Asset Photographs

The assessor will include a recent photograph of the front of the building and a description, including building name and location. Please refer to Section "**1.5.2 Required System Photographs**" for photograph specifications.

1.7.3 Asset Narratives

Please note all VFA narrative fields are limited to 4,000 characters, which equates to around one page of text. In the case where existing narratives exceed this limitation, the content will be truncated; however its full content will be available in a document attached to the asset for first time review and update in VFA. All narrative fields must be updated to maximum limit of 4000 characters when updating a BCR in VFA.

1.7.3.1 BCR Project Team and Documents

When creating or adding to this narrative, include the following:

- Optional tasks included as part of the call-up for this BCR;
- List of participants including: name, discipline and the company they work for;
- Limitations on liability (only if required by the consultant);
- List of documents reviewed;
- List of drawings reviewed.

1.7.3.2 Building History

When creating or adding to this narrative, include the following:

- Date the asset was constructed;
- Subsequent additions;
- Major alterations/renovations;
- Any known changes in the building/facility use and occupancy.

1.7.3.3 BCR Executive Summary

When creating or adding to this narrative, include the following:

- A brief description of the Asset (if previously completed please verify content for accuracy), including:
 - i. Location
 - ii. Exterior walls
 - iii. Roof cover
 - iv. Frame
 - v. Heating and Cooling System
 - vi. Number of Floors above and below grade, gross area
 - vii. Parking structures/lots
 - viii. Other significant site improvements
- A description of the original design intent;
- Description of what the asset is currently being used as;
- Provide an overall assessment of the condition of the asset and provide an estimate of its remaining service life.
- Limit the BCR Executive Summary to 4000 characters

1.7.3.4 Design Parameters & Deficiencies – current & future

If a Functionality and Serviceability Assessments (FSA) has been carried out since the last BCR was completed, the assessor will review the identified serviceability issues and recommend solutions by creating and entering requirements into the BCR Survey. The

assessor will describe the issues reviewed and write an overview of the recommendations under this heading.

If a FSA has not been completed, systems that received an unsatisfactory rating during the last BPR shall be considered as the source of serviceability issues. Each unsatisfactory system is to be reviewed, serviceability issues identified and solutions recommended. The assessor will describe the issues reviewed and write an overview of the recommendations under this heading.

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

For the parameters listed below, the assessor will compare the maximum capacities against those required for the current workstation density, and any workstation density proposed for the future and make recommendations to overcome any physical or code limiting factors (excluding floor area).

If a workstation density for the future is not provided, use the maximum number possible. The maximum possible number of workstations can be calculated by dividing the usable area of the building by the target area allowed per workstation, as per the PSPC Workplace 2.0 fit-up standard.

The parameters are:

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

1.7.3.5 Overview of Architectural & Structure Condition

The assessor will provide a description of the following structural characteristics:

- Size of structural column grid with respect to floor layout, remodeling potential and floor plate dimensions;
- Eccentricity of the core relative to the center of the building;
- Floor – ceiling dimensions;
- Adequacy of the plenum space;
- Shear walls, X-bracing, moment frame;
- Run-off water control;
- Abnormal deflection/deformation of visible structural systems.

The assessor will provide an overview, condition, recommendations and the long-term outlook for the following building elements:

- Foundations, basements, crawl spaces;
- Super Structure, including the frame and floor and roof structure;
- Overview of seismic screening (only if it is part of the call up);
- Building Envelope, including the exterior cladding, the windows (including skylights, exterior doors, and the roof cover;
- Interior elements including, interior design/layout, the wall finishes, ceiling finishes, floor finishes, lobby, washrooms and cafeteria.

1.7.3.6 Overview Site Condition

The assessor will provide an overview of the functionality and condition of the site improvements and long-term outlook, including the following systems:

- Landscaping and site related systems;
- Paved surface systems including, roadways, sidewalks, parking lots, recreational areas and playgrounds;
- Unpaved surface systems including, roadways, walkways, parking lots, recreational areas, and playground.

1.7.3.7 Overview of Vertical & Horizontal Transportation Condition

The assessor will provide an overview of the condition and recommendations for the primary vertical/horizontal transportation systems, including the long-term outlook.

1.7.3.8 Overview of Mechanical Systems Condition

The assessor will provide an overview of the condition and recommendations for the major mechanical systems, including the long-term outlook.

1.7.3.9 Overview of Electrical Systems Condition

The assessor will provide an overview of the condition and recommendations for the major electrical systems, including the long-term outlook.

1.7.3.10 Comply with MD 15000-2012 Mechanical Environmental Standard for Federal Office Buildings for temperature, relative humidity and ventilation targets

The assessor will ensure compliance with "RPB Standard MD 15000-2012 Mechanical Environmental Standard for Federal Office Buildings (If the asset meets or exceeds these targets, the assessor will describe any adverse effects on the asset's systems, if they exist. If the asset does not meet or exceed these targets, the assessor will describe why and what

could be done to meet the temperature and humidity targets. Any recommended requirements shall be added to the VFA Survey).

1.7.3.11 Regulatory Testing Confirmation

The assessor will review the latest regulatory testing results and list any tests that were omitted. Include recommendations for remedial action if necessary and the reasons for omission.

1.7.3.12 Compliance with Accessibility Standards

The assessor will complete this narrative field when an accessibility audit is available. The narrative field shall contain a summary of the results of the audit and detail any project work that has been completed related to the findings.

1.7.3.13 Overview of Seismic Screening

This narrative shall include a seismic site review, including notable observations and any qualifications used in determining the Structural Priority Index (SPI) score.

1.7.3.14 Overview of Environmental Issues

The assessor will review the latest Environmental Assessment and create requirements to address any environmental issues raised. These issues could include:

- Asbestos Management;
- PCB Management;
- Hazardous Material Management;
- Ozone Depleting Substances Management;
- Pest Management Initiatives;
- Storage Tanks;
- Waste Management Initiatives;

If asked, the assessor will write a summary of the results of **Green Globes Assessment**.

1.7.3.15 Overview of Project Grouping

The assessor will list, in summary format, all the “**requirements**” that should be grouped and implemented at the same time due to their interdependence. The assessor will provide a justification for each grouping proposed and indicate if the tenants will need to vacate the area or the whole asset during project implementation.

1.7.3.16 Code Compliance Summary

The assessor will check for code compliance of the following building equipment and systems:

- Occupancy types/loads;

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- Ventilation;
- Heating;
- Cooling;
- Pressure Vessels;
- Fire Detection/Protection;
- Emergency doors/exits/lighting;
- Electrical power capacity;
- Lighting;
- Elevators;
- Washrooms.

The assessor will review the latest version of the BPR (see the next heading) and review the paragraph on code compliance. The assessor will list all code infractions, categorized by:

- National Building Code;
- Provincial Building Code;
- Fire and Safety Code

For each infraction, the assessor shall include a recommended remedy in the form of a Requirement entered into the VFA Survey and indicate if addressing the infraction could be delayed due to the age of the building.

1.7.3.17 Building Performance Review

When completed, the latest BPR will have been entered under this heading in the VFA Survey and each system will have a "Satisfactory" or "Unsatisfactory" rating. The assessor will review the section on tenant satisfaction and discuss any Unsatisfactory ratings with the Property Manager. Equipment or systems that have ongoing operational issues are to be assessed and recommendations in the form of requirements made to address these issues shall be added to the BCR Survey. A summary of the issues and recommendations shall be written in narrative field "Design Parameters & Deficiencies – current & future".

1.8 Survey Inspection Process

1.8.1 VFA Survey Reports

The VFA suite can generate various types of reports. Three key report types that will be useful to the BCR team are the System/Requirement listing, Condition, and the Technical Listing. The first lists the asset's Systems and all the associated Requirement information. The second type of report is a condition report which is available with or without pictures. This report will give the user a complete record of all the data and deficiencies that has been entered into the VFA Survey, including all of the asset narratives. Printed off at the beginning of the inspection process, this report can also be used by the BCR inspection team to collect

the building condition information. The third type of report is a technical component list. This report is used to give the user an overview of system condition and the total of all requirements scheduled in any given year for each system.

1.8.2 VFA Surveys

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

1.8.3 Interview with the Asset Management Team

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

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

Appendix I – Capital versus Repair

The Definitions of Capital versus Repair used for Requirement classification in VFA.

Before identifying an event as CAPITAL, the cost must be greater than \$25k, and one or more of the following rules must apply. Otherwise the event should be classified as a REPAIR:

Does the Requirement...

- Provide an increase in quality over original? The work is being done solely for the purpose of improving the functioning of the asset. If however the work is being done due to the poor condition of the system and the replacement is inherently more functional or of higher quality due to being newer, then the event is a Repair Requirement.
- Improve operating efficiency? The work is being done solely for the purpose of improving the operating efficiency of the asset. If, however, the work is being done due to the poor

condition of the system and the replacement is inherently more operationally efficient, then the event is a Repair Requirement.

- Add a new item, system or function to the asset? Adding accessibility capability such as door openers to an asset that does not have them would be considered a Capital Requirement, but replacing existing door openers that are in poor condition would be a Repair Requirement.
- Increase the area of the building? Adding a new wing or floor to the asset.

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

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

Appendix II - Requirement Classification

Requirement Structure

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

The requirement structure is;

- **Integrity**
 - Lifecycle
Components or Systems that are approaching or have exceeded their useful life. (Examples: a 25-year old chiller that is approaching the end of its useful life and is recommended to be replaced within the next 5 years; a 15 year old

membrane roof that is prematurely aged and showing signs of wear and leaking)

- Reliability

Components or Systems that are not working as designed and/or cannot be depended upon, but have not yet exceeded their useful life. (Examples: a recently installed mechanical control that is not operating properly or functioning in an unpredictable manner. Breaches in the roof membrane or deteriorated window sealants).

- **Optimization**

- Abandoned

Equipment or Facility Systems that have been abandoned in place. (Examples: old cooling tower abandoned on the roof; old oil storage tank abandoned in the basement)

- Capacity

Problems with a System's ability to meet current demand. (Examples: heating equipment that cannot adequately cover its intended area)

- Energy

Conditions that adversely affect energy use (Examples: single-pane windows, lack of pipe insulation).

- Maintenance

Components or Systems that require routine maintenance (Examples: recalibration of thermostats, cleaning of ducts, cyclical painting, other aesthetic considerations)

- Mission

Components or Systems that do not meet the critical standards of the organization, per the guidelines provided by the client. (Examples: the facility needs to be operational on a 24/7 basis...therefore redundancy/backup components need to be added, e.g. dual-fuel boilers; plant adaptation, e.g. required additions/alterations associated with the conversion of a classroom facility into a dormitory; client driven security vulnerabilities)

- Sustainability

Improvements where components and/or Systems potentially have a sustainable opportunity (other than Energy based). (Examples: water conservation

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measures, use of building materials and resources based on sustainable procurement and with recycled/bio-based content, improvement of indoor environmental quality and considerations that reduce the impact of the building and its operations on the surrounding site.)

- Technological Improvements

Conditions that need to be made modern to meet current tech standards. (Examples: pneumatic to DDC; non-energy based upgrades).

- **Regulatory**

- Accessibility

Conditions that violate accessibility guidelines, such as the Americans with Disabilities Act or Barrier-Free Design Standards. (Examples: non-accessible building entrances, plumbing fixtures, or door hardware)

- Building Code

Conditions that violate the client specified local and/or national Building codes (Examples: lack of backflow protection, insufficient ventilation, OSHA violations).

- HazMat

Regulatory issues associated with Asbestos, Lead, PCB, and other situations in which hazardous materials are known or suspected to be present in the Asset. (Examples: suspected asbestos pipe insulation or floor tiles)

- Life Safety

Conditions that pose an immediate danger to human life or safety. (Examples: blocked emergency egress, dead-end corridors, damaged and/or non-functional fire protection or emergency Systems).

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APPENDIX C - TEAM IDENTIFICATION FORMAT

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

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

I. Prime Consultant (Proponent - Architect):

Firm or Joint Venture Name

.....

.....

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

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II. Key Sub Consultants / Specialists:

Mechanical

Firm Name:

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

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Electrical

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

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Structural

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

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Vertical Transportation

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

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APPENDIX D - DECLARATION/CERTIFICATIONS FORM

Project Title: VFA Facility Condition Assessment – Joseph A Ghiz Building

Name of Proponent:

Street Address:

Mailing Address:

Telephone Number: ()

Fax Number: ()

E-Mail:

Procurement Business Number:

Type of Organization: _____ Sole Proprietorship _____ Partnership _____ Corporation _____ Joint Venture	Size of Organization: Number of Employees _____ Graduate Architects / Professional Engineers _____ Other Professionals _____ Technical Support _____ Other _____
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APPENDIX D - DECLARATION/CERTIFICATIONS FORM (CONT'D)

Former Public Servant (FPS) - Certification

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

Definitions

For the purposes of this clause,

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

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

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

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

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of Parliament Retiring Allowances Act, R.S., 1985, c.M-5, and that portion of pension payable to the Canada Pension Plan Act, R.S., 1985, c.C-8.

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

Former Public Servant in Receipt of a Pension

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

YES () NO ()

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

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

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

Work Force Adjustment Directive

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

If so, the Proponent must provide the following information:

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

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

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

Name of Proponent:

DECLARATION:

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

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

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

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

E-mail: _____

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

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APPENDIX E - PRICE PROPOSAL FORM

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

PROPOSERS SHALL NOT ALTER THIS FORM

Project Title:

Name of Proponent:

The following will form part of the evaluation process:

REQUIRED SERVICES

TOTAL FEE FOR REQUIRED SERVICES

\$_____