



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

**Bid Receiving - PWGSC / Réception des
soumissions – TPSGC**

11 Laurier St. / 11 rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

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

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

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

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

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Centre Block Procurement Directorate/Direction des achats
pour l'édifice du Centre

185 Sparks Street, 3rd floor,

Ottawa

Ontario

K1A 0S5

| | |
|--|---|
| Title - Sujet PMSS - Centre Block Rehabilitation | |
| Solicitation No. - N° de l'invitation EP748-151921/B | Date 2016-10-21 |
| Client Reference No. - N° de référence du client 20151921 | |
| GETS Reference No. - N° de référence de SEAG PW-\$\$FQ-002-71755 | |
| File No. - N° de dossier fq002.EP748-151921 | CCC No./N° CCC - FMS No./N° VME |
| Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2016-11-21 | Time Zone Fuseau horaire Eastern Standard Time EST |
| F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/> | |
| Address Enquiries to: - Adresser toutes questions à: Beriault, Mark | Buyer Id - Id de l'acheteur fq002 |
| Telephone No. - N° de téléphone (819) 775-5750 () | FAX No. - N° de FAX (819) 775-7369 |
| Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA CENTRE BLOCK 111 WELLINGTON ST OTTAWA Ontario K1A0A9 Canada | |

Instructions: See Herein

Instructions: Voir aux présentes

| | |
|--|--|
| Delivery Required - Livraison exigée See Herein | 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 |

TABLE OF CONTENTS

| | |
|---|------------|
| PART 1 - GENERAL INFORMATION | 3 |
| 1.1 INTRODUCTION | 3 |
| 1.2 SUMMARY | 4 |
| 1.3 DEBRIEFINGS | 4 |
| PART 2 - BIDDER INSTRUCTIONS | 5 |
| PART 3 - BID PREPARATION INSTRUCTIONS | 16 |
| PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION | 20 |
| 4.1 EVALUATION PROCEDURES | 20 |
| 4.2 BASIS OF SELECTION | 20 |
| PART 5 - CERTIFICATIONS AND ADDITIONAL INFORMATION | 22 |
| 5.1 CERTIFICATIONS REQUIRED WITH THE BID | 22 |
| 5.2 CERTIFICATIONS PRECEDENT TO CONTRACT AWARD AND ADDITIONAL INFORMATION | 22 |
| PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS | 25 |
| 6.1 SECURITY REQUIREMENTS | 25 |
| PART 7 - RESULTING CONTRACT CLAUSES | 26 |
| 7.1 STATEMENT OF WORK | 26 |
| 7.2 GENERAL CONDITIONS | 26 |
| 7.3 SECURITY REQUIREMENTS | 47 |
| 7.4 TERM OF CONTRACT | 47 |
| 7.5 AUTHORITIES | 48 |
| 7.6 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS | 49 |
| 7.7 PAYMENT | 49 |
| 7.8 INVOICING INSTRUCTIONS | 51 |
| 7.9 CERTIFICATIONS AND ADDITIONAL INFORMATION | 52 |
| 7.10 APPLICABLE LAWS | 52 |
| 7.11 PRIORITY OF DOCUMENTS | 53 |
| 7.12 FOREIGN NATIONALS (CANADIAN CONTRACTOR AND/OR FOREIGN CONTRACTOR) | 53 |
| 7.13 INSURANCE REQUIREMENTS | 54 |
| 7.14 RESOURCES | 57 |
| ANNEX "A" | 64 |
| STATEMENT OF WORK | 64 |
| ANNEX "B" | 104 |
| BASIS OF PAYMENT | 104 |
| ANNEX "C" | 121 |
| SECURITY REQUIREMENTS CHECK LIST | 121 |
| ANNEX D | 128 |
| TECHNICAL EVALUATION CRITERIA | 128 |
| ANNEX "E" | 152 |
| PRICING SCHEDULE | 152 |

Solicitation No. - N° de l'invitation
EP748-151921/B
Client Ref. No. - N° de réf. du client

Amd. No. - N° de la modif.
File No. - N° du dossier
EP748-151921

Buyer ID - Id de l'acheteur
FQ002
CCC No./N° CCC - FMS No./N° VME

| | |
|--|-----|
| <u>ANNEX "F" TO PART 3 OF THE BID SOLICITATION</u> | 156 |
| <u>ELECTRONIC PAYMENT INSTRUMENTS</u> | 156 |
| <u>ANNEX "G" TO PART 5 OF THE BID SOLICITATION</u> | 157 |
| <u>FORMER PUBLIC SERVANT – CERTIFICATION</u> | 157 |
| <u>ANNEX "H" TO PART 5 OF THE BID SOLICITATION</u> | 159 |
| <u>INTEGRITY DECLARATION FORM</u> | 159 |
| <u>ANNEX "I" TO PART 5 OF THE BID SOLICITATION</u> | 167 |
| <u>FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION</u> | 167 |
| <u>ANNEX "J" TO PART 5 OF THE BID SOLICITATION</u> | 168 |
| <u>NON-DISCLOSURE – CERTIFICATION</u> | 168 |

PART 1 - GENERAL INFORMATION

1.1 Introduction

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include:

- Annex "A" - Statement of Work;
- Annex "B" - Basis of Payment;
- Annex "C" - Security Requirements Check list;
- Annex "D" - Technical Evaluation Criteria;
- Annex "E" - Pricing Schedule;
- Annex "F" to Part 3 of the Bid Solicitation - Electronic Payment Instruments;
- Annex "G" to Part 5 of the Bid Solicitation - Integrity Provisions - Declaration of Convicted Offenses;
- Annex "H" to Part 5 of the Bid Solicitation - Federal Contractors Program for Employment Equity Certification;
- Annex "I" Insurance Requirements.

1.2 Summary

1.2.1 This bid solicitation is being issued to satisfy the requirement of the Department of Public Works and Government Services. This requirement is for the provision of Project Management Support Services to provide project management and administrative services for the delivery of the Centre Block (CB) Rehabilitation Project on-schedule, within budget and to the level of quality required for a building of this stature.

1.2.2 This bid solicitation is intended to result in the award of a Contract for a duration of 5 years from the date of Contract award, plus options to exercise two 4-year extensions, as well as options to exercise four 1-year extensions.

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

1.2.4 The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Agreement on Internal Trade (AIT), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CCOFTA), the Canada-Panama Free Trade Agreement (Canada-Panama FTA), the Canada-Honduras Free Trade Agreement (CHFTA) and the Canada-Korea Free Trade Agreement (CKFTA).

1.2.5 The Federal Contractors Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications and Additional Information, Part 7 - Resulting Contract Clauses and Annex "H" titled Federal Contractors Program for Employment Equity - Certification.

1.3 Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

2.1.1 All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada. Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

2.1.2 The 2003 (2016-04-04) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

2.1.2.1 Subsection 4 of section 5 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: "60 days"
Insert: "120 days"

2.1.2.2 Section 8 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is **Deleted**

2.2 SACC Manual Clauses

2.2.1 SACC Manual clause A2000C (2006-06-16), Foreign Nationals (Canadian Contractor) is incorporated by reference into and forms part of this bid solicitation.

2.2.2 SACC Manual clause A2001C (2006-06-16), Foreign Nationals (Foreign Contractor) is incorporated by reference into and forms part of this bid solicitation.

2.3 Submission of Bids

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

2.3.2 Due to the nature of the bid solicitation, bids transmitted by facsimile to PWGSC will not be accepted.

2.4 Enquiries - Bid Solicitation

2.4.1 All enquiries must be submitted in writing to the Contracting Authority no later than five (5) calendar days before the bid closing date. Enquiries received after that time may not be answered.

2.4.2 Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be

clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.5 Applicable Laws

2.5.1 Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of Ontario.

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

2.6 Improvement of Requirement during Solicitation Period

2.6.1 Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least five (5) calendar days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

2.7 Basis for Canada's Ownership of Intellectual Property:

2.7.1 The Department of PWGSC has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, for the following reasons, as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#): the main purpose of the Contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

2.8 Former Public Servant

2.8.1 Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a

time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

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

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

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

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

2.8.2 Former Public Servant in Receipt of a Pension

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

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

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

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

2.8.3 Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

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

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Canada requests that Bidders provide their bid in separately bound sections and on separate media for soft copies, as follows:

Section I: Technical Bid four (4) hard copies and one (1) soft copy on USB.

Section II: Financial Bid one (1) hard copy and one (1) soft copy on USB.

Section III: Certifications one (1) hard copy.

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

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

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

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

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

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

3.6 Section I: Technical Bid

3.6.1 In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

3.6.2 The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same

headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

- 3.6.3 The maximum number of pages (including text and graphics) to be submitted for each rated requirement is stipulated within each criterion description. Where a maximum page limit applies, all pages in excess of the stipulated limit will not be evaluated and only the information contained in the stipulated maximum number of pages will be evaluated.

3.7 Section II: Financial Bid

- 3.7.1 Bidders must submit their financial bid in accordance with the Pricing Schedule detailed in Annex "E". The total amount of Applicable Taxes must be shown separately.

3.7.2 Electronic Payment of Invoices – Bid

- 3.7.2.1 If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Annex "F" Electronic Payment Instruments, to identify which ones are accepted.

- 3.7.2.2 If Annex "F" Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.

- 3.7.2.3 Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

3.7.3 Exchange Rate Fluctuation

- 3.7.3.1 The requirement does not offer exchange rate fluctuation risk mitigation. Requests for exchange rate fluctuation risk mitigation will not be considered. All bids including such provision will render the bid non-responsive.

3.8 Section III: Certifications

- 3.8.1 Bidders must submit the certifications and additional information required under Part 5 of this bid solicitation.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4 Evaluation Procedures

Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.

4.1 An evaluation team composed of representatives of Canada will evaluate the bids.

4.1.1 Technical Evaluation

Mandatory and point rated technical evaluation criteria are included in "Annex D".

4.1.2 Financial Evaluation

For bid evaluation and Bidder selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Schedule detailed in "Annex E".

4.1.3 Number of Resources Evaluated

Only a certain number of resources per resource category will be evaluated as part of this bid solicitation as identified in Annex D. Additional resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Appendix D to Annex A. When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form's Statement of Work. The proposed resource will then be assessed against the criteria identified in the Contract's Statement of Work in accordance with Appendix F to Annex A.

4.2 Basis of Selection

4.2.1 To be declared responsive, a bid must:

- a. comply with all the requirements of the bid solicitation; and
- b. meet all mandatory criteria; and
- c. obtain the required minimum of 415 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 830 points.

4.2.2 Bids not meeting (a) or (b) or (c) will be declared non-responsive.

4.2.3 The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.

4.2.4 To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.

4.2.5 To establish the pricing score, the overall pricing score for each responsive bid will be determined as follows:

$$\text{Pricing Score} = 30 - \left(\frac{\text{Price Proposal} - \text{Lowest Price Proposal}}{\text{Lowest Price Proposal} \times 0.5} \times 30 \right)$$

- 4.2.6 In the event that the equation above yields a negative value, the Bidder will be given a pricing score of zero (0). No deductions will be applied by Canada to the technical score.
- 4.2.7 For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
- 4.2.8 Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.
- 4.2.9 The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating Technical Merit (70%) and Price (30%)

| | | Bidder 1 | Bidder 2 | Bidder 3 |
|--------------------------------|------------------------------|--|--|--|
| Overall Technical Score | | 115/135 | 89/135 | 92/135 |
| Bid Evaluated Price | | \$55,000.00 | \$50,000.00 | \$45,000.00 |
| Calculations | Technical Merit Score | $115/135 \times 70 = 59.63$ | $89/135 \times 70 = 46.15$ | $92/135 \times 70 = 47.70$ |
| | Pricing Score | $30 - [(55-45)/(45 \times 0.5) \times 30] = 16.67$ | $30 - [(50-45)/(45 \times 0.5) \times 30] = 23.33$ | $30 - [(45-45)/(45 \times 0.5) \times 30] = 30.00$ |
| Combined Rating | | 76.30 | 69.48 | 77.70 |
| Overall Rating | | 2nd | 3rd | 1st |

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

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

5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

5.1.1 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 Bidder must provide with its bid the required documentation, as applicable, to be given further consideration in the procurement process.

Declaration of Convicted Offences can be found at Annex G to Part 5 of this bid solicitation or at the following website: Integrity Declaration Form (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>).

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Integrity Provisions – Required Documentation

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

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the

bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website:
(http://www.esdc.gc.ca/en/jobs/workplace/human_rights/employment_equity/federal_contractor_program.page?ga=1.229006812.1158694905.1413548969#afed).

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

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

This form can be found at Annex H to Part 5 of this bid solicitation.

5.3 Additional Certifications Precedent to Contract Award

5.3.1 Status and Availability of Resources

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

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

5.3.2 Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the

Solicitation No. - N° de l'invitation
EP748-151921/B
Client Ref. No. - N° de réf. du client

Amd. No. - N° de la modif.
File No. - N° du dossier
EP748-151921

Buyer ID - Id de l'acheteur
FQ002
CCC No./N° CCC - FMS No./N° VME

Bidder for the requirement is capable of performing the Work described in the resulting contract.

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

6.1.1 At the date of bid closing, the following conditions must be met:

- (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
- (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses; and
- (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.

6.1.2 For additional information on security requirements, Bidders should refer to the Industrial Security Program (ISP) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

6.2 Insurance Proof of Availability Prior to Contract Award

- (a) The Bidder must provide a letter from an insurance broker or an insurance company licensed to operate in Canada stating that the Bidder, if awarded a contract as a result of the bid solicitation, can be insured in accordance with the Insurance Requirements specified in Annex I.
- (b) If the information is not provided in the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A".

7.1.1 Task Authorization

7.2.1.1 Canada's Obligation - Portion of the Work - Task Authorizations

Canada's obligation with respect to the portion of the Work under the Contract that is performed through task authorizations is limited to the total amount of the actual tasks performed by the Contractor.

7.1.1.2 Task Authorization

- (a) As-and-when-requested Task Authorizations: A portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.
- (b) Assessment of Resources Proposed at TA Stage: Processes for issuing, responding to and assessing Task Authorizations are further detailed in Appendices D, E, F and G to Annex "A".

7.2 General Conditions

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

7.2.1 General Conditions

SACC Manual clause [2035](#) (2016-04-04), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

7.2.2 Supplemental General Conditions

SAAC Manual clause [4007](#) (2010-08-16) Canada to Own Intellectual Property Rights in Foreground Information, apply and form part of the Contract.

7.3 Security Requirements

The following security requirements (*SRCL and related clauses provided by ISP*) apply and form part of the Contract.

7.3.1 SECURITY REQUIREMENT FOR CANADIAN SUPPLIER:

1. The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of **SECRET**, issued by the Canadian Industrial Security Directorate (CISD), Public Services and Procurement Canada (PSPC).
2. The Contractor's personnel requiring access to secure work site(s) must, at all times during the performance of the Contract, EACH hold a valid personnel security screening at the level of **SECRET** and all others must have a valid **SITE ACCESS** clearance required, granted or approved CISD/PSPC.
3. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PSPC.
4. The Contractor must comply with the provisions of the:
 - (a) Security Requirements Check List and security guide (if applicable), attached at Annex C
 - (b) *Industrial Security Manual* (Latest Edition).

7.3.2 SECURITY REQUIREMENT FOR FOREIGN SUPPLIER:

1. The contractor and/or any and all subcontractors must be from a country with which Canada has an international bilateral industrial security instrument. The Contract Security Program (CSP) has international bilateral industrial security instruments with the countries listed on the following PSPC website: <http://ssi-iss.tpsgc-pwgsc.gc.ca/gvrnmnt/risi-iisr-eng.html>
2. The Foreign recipient **Contractor / Subcontractor** shall, at all times during the performance of the **Contract**, hold a valid Facility Security Clearance, issued by the NSA/DSA of the supplier's country, at the equivalent level of **SECRET** in accordance with the national policies of the supplier's country.
3. All **CANADA CLASSIFIED** information / assets accessed by the Foreign recipient **Contractor / Subcontractor** shall NOT be safeguarded at the Foreign recipient's sites.
4. **CANADA CLASSIFIED** information/assets shall be released only to Foreign recipient **Contractor / Subcontractor** personnel, who have a need-to-know for the performance of the **Contract** and who have a Personnel Security Clearance at the level of **SECRET** as required, granted by their respective National Security Authority (NSA) or Designated Security Authority (DSA) of the supplier's country, in accordance with national policies of the supplier's country.
5. The Foreign recipient **Contractor / Subcontractor** must comply with the provisions of the Security Requirements Check List attached at Annex "C".
6. In the event that a Foreign **Contractor / Subcontractor** is chosen as a supplier for this Contract, subsequent Country-Specific Foreign security requirement clauses shall be generated and promulgated by the Canadian DSA, and provided to the Government of Canada Contracting Authority, to ensure compliance with the security provisions, as defined by the Canadian DSA, in relation to equivalencies.

7.4 Term of Contract

7.4.1 Period of the Contract

7.4.1.1 The period of the Contract is from the date of Contract award to December 31, 2021 inclusive.

7.4.2 Option to Extend the Contract

7.4.2.1 The Contractor grants to Canada the irrevocable options to extend the term of the Contract under the same conditions as follows: Option 1 – from January 1, 2022 to December 31, 2025; Option 2 – from January 1, 2026 to December 31, 2029; Option 3 – January 1, 2030 to December 31, 2030; Option 4 – January 1, 2031 to December 31, 2031; Option 5 – January 1, 2032 to December 31, 2032; Option 6 – January 1, 2033 to December 31, 2033. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

7.4.2.2 Canada may exercise the respective individual options 1 through 6, as applicable, at any time by sending a written notice to the Contractor at least ninety (90) calendar days before the expiry date of the Contract. The options may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Mark Beriault
Title: Contracting Authority
Public Works and Government Services Canada
Acquisitions Branch
Directorate: Centre Block Procurement
Address: 185 Sparks Street, 3rd floor, Ottawa, Ontario

Telephone: 819-775-5595
E-mail address: mark.beriault@pwgsc-tpsgc.gc.ca

7.5.2 Departmental Representative

Name: (Fill in at time of Contract award)
Title:
Address:
Telephone:
E-mail address:

The Departmental Representative is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Departmental Representative; however, the Departmental Representative has no authority to authorize changes to the scope of the Work. Changes to

the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

7.5.3 Contractor's Representative

(Fill in at time of Contract award).

7.6 Proactive Disclosure of Contracts with Former Public Servants

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

7.7 Payment

7.7.1 Basis of Payment

7.7.1.1 The Contractor will be paid the firm all-inclusive hourly rate(s) subject to economic price adjustments, as specified in 'Annex B', for the Work performed in accordance with the Contract. Customs duties are included and Applicable Taxes are extra.

7.7.2 Limitation of Expenditure

7.7.2.1 Canada's total liability to the Contractor under the Contract must not exceed \$ **To be Identified at contract award** Customs duties are included and Applicable Taxes are extra.

a. For the services requested by the Departmental Representative and listed below:

- translation services;
- framing and mounting of photograph services; and
- printing services.

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Annex B, to a limitation of expenditure of \$_____ (**To be Identified at contract award**). Customs duties and Applicable Taxes are included.

7.7.2.2 Canada's total liability to the Contractor under the Contract, **including** options, must not exceed \$ **To be identified at contract award**. Customs duties are included and Applicable Taxes are extra.

7.7.2.3 No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The

Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

- b. when it is 75 percent committed, or
- b. four (4) months before the contract expiry date, or
- c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.

7.7.2.4 If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

7.7.3 Method of Payment

7.7.3.1 Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

- a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all such documents have been verified by Canada;
- c. the Work performed has been accepted by Canada.

7.7.4 Payment by Reference

7.7.4.1 Pursuant to paragraph 221 (1)(d) of the Income Tax Act, R.S. 1985, c. 1 (5th Supp.), payments made by departments and agencies to contractors under applicable services contracts (including contracts involving a mix of goods and services) must be reported on a T1204 Government Service Contract Payments slip.

7.7.4.2 To enable departments and agencies to comply with this requirement, the Contractor must provide Canada, upon request, its business number or Social Insurance Number, as applicable. (These requests may take the form of a general call-letter to contractors, in writing or by telephone).

7.7.5 Electronic Payment of Invoices – Contract

(Below clause to remain or be removed as applicable at contract award).

7.7.5.1 The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);
- f. Large Value Transfer System (LVTS) (Over \$25M)

7.7.6 Discretionary Audit

7.7.6.1 The following are subject to government audit before or after payment is made:

- a. The amount claimed under the Contract, as computed in accordance with the Basis of Payment, including time charged.
- b. The accuracy of the Contractor's time recording system.
- c. The estimated amount of profit in any firm-priced element, firm time rate, firm overhead rate, or firm salary multiplier, for which the Contractor has provided the appropriate certification. The purpose of the audit is to determine whether the actual profit earned on a single contract if only one exists, or the aggregate of actual profit earned by the Contractor on a series of negotiated contracts containing one or more of the prices, time rates or multipliers mentioned above, during a particular period selected, is reasonable and justifiable based on the estimated amount of profit included in earlier price or rate certification(s).
- d. Any firm-priced element, firm time rate, firm overhead rate, or firm salary multiplier for which the Contractor has provided a "most favoured customer" certification. The purpose of such audit is to determine whether the Contractor has charged anyone else, including the Contractor's most favoured customer, lower prices, rates or multipliers, for like quality and quantity of goods or services.

Any payments made pending completion of the audit must be regarded as interim payments only and must be adjusted to the extent necessary to reflect the results of the said audit. If there has been any overpayment, the Contractor must repay Canada the amount found to be in excess.

7.8 Invoicing Instructions

The Contractor must submit invoices in accordance with the section entitled Invoice Submission of the General Conditions.

7.8.1 Additional Invoicing Instructions

7.8.1.1 Invoices cannot be submitted until all work identified in the invoice is completed.

7.8.1.2 Each invoice must be supported by:

- a. a copy of time sheets to support the time claimed. Time sheets must contain a detailed log of activities performed during the time period covered on the invoice.

7.8.1.3 Invoices must be distributed as follows:

- a. The original must be forwarded to the following address for certification and payment.

DGCPfactures.PPBinvoices@pwgsc-tpsgc.gc.ca

- b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

7.9 Certifications and Additional Information

7.9.1 Compliance

- 7.9.1.1 Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

7.9.2 Federal Contractors Program for Employment Equity - Default by the Contractor

- 7.9.2.1 The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "FCP Limited Eligibility to Bid" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

7.10 Applicable Laws

- 7.10.1 The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of Ontario.

7.11 Priority of Documents

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

- a. the Articles of Agreement;
- b. the supplemental general conditions 4007 (2010-08-16);
- c. the general conditions 2035 (2016-04-4);
- d. Annex A, Statement of Work;
- e. Annex B, Basis of Payment;
- f. Annex C, Security Requirements Check List;
- g. Annex D, Technical Evaluation Criteria;
- h. Annex E, Pricing Schedule;
- i. Annex F, to Part 3 of the Bid solicitation-Electronic Payment Instruments;
- j. Annex G to Part 5 of Bid solicitation- Integrity Provisions-Declaration of Convicted Offenses;
- k. Annex H to Part of the bid solicitation –Federal Contractors Program for Employment Equity Certification:
- l. Annex I Insurance requirements;
- m. the Contractor's bid dated_____ (insert at time of contract award)

7.12 Foreign Nationals (Canadian Contractor and/or Foreign Contractor)

7.12.1 Foreign Nationals (Canadian Contractor)

7.12.1.1 The Contractor must comply with Canadian immigration requirements applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Service Canada regional office to enquire about Citizenship and Immigration Canada's requirements to issue a temporary work permit to a foreign national. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

7.12.2 Foreign Nationals (Foreign Contractor)

7.12.2.1 The Contractor must comply with Canadian immigration legislation applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Canadian Embassy, Consulate or High Commission in the Contractor's country to obtain instructions, information on Citizenship and Immigration Canada's requirements and any required documents. The Contractor is responsible to ensure that foreign nationals have the required information, documents and authorizations before performing any work under the Contract in Canada. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

7.13 Insurance Requirements

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

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

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

ANNEX "A"

STATEMENT OF WORK

TABLE OF CONTENTS

| | |
|---|-------------------------------------|
| 1.0 SCOPE | 26 |
| 1.1 OBJECTIVE..... | 26 |
| 1.2 BACKGROUND | 26 |
| 1.3 TERMS, ACRONYMS AND ABBREVIATIONS | 26 |
| 1.4 REFERENCE DOCUMENTS | 26 |
| 2.0 KEY PROJECT DETAILS | 27 |
| 2.1 PROJECT SCOPE | 27 |
| 2.2 CONSTRAINTS AND CHALLENGES | 27 |
| 2.3 COST MANAGEMENT OBJECTIVES | 27 |
| 2.4 TIME MANAGEMENT OBJECTIVES | 27 |
| 2.5 QUALITY OBJECTIVES | 28 |
| 2.6 PROJECT TEAM ROLES AND ORGANIZATION | 28 |
| 3.0 REQUIREMENTS | 30 |
| 3.1 SCOPE | 30 |
| 3.2 MEDIA..... | 31 |
| 3.3 SECURITY OF PROJECT INFORMATION..... | ERROR! BOOKMARK NOT DEFINED. |
| 3.4 RESPONSE TIME | 31 |
| 3.5 OFFICIAL LANGUAGES | 31 |
| 3.6 PROJECT OFFICE..... | 31 |
| 3.7 LEVEL OF EFFORT..... | 32 |
| 3.8 RESOURCES REQUIREMENTS | 32 |
| 3.9 TASKS BY PMSS CONTRACTOR REQUIRED RESOURCES | 33 |
| 3.10 TASKS BY PMSS CONTRACTOR OPTIONAL RESOURCE..... | 39 |
| 3.11 DELIVERABLES | 42 |
| APPENDIX A – PROJECT BACKGROUND | 48 |
| APPENDIX B – TERMS, ACRONYMS AND ABBREVIATIONS | 56 |
| APPENDIX C – REFERENCE DOCUMENTS..... | 60 |

1.0 SCOPE

1.1 Objective

The objective of this statement of work (SOW) is to engage the expertise of a Project Management Support Services (PMSS) Contractor to provide project management and administrative services for the delivery of the Centre Block (CB) Rehabilitation Project on-schedule, within budget and to the level of quality required for a building of this stature.

1.2 Background

The CB is the core component within the Parliament Hill complex, occupying a central position between the East and West Block buildings, Library of Parliament (LoP) and the emerging Visitor Welcome Centre (VWC). It is at the very heart of Canada's political and cultural landscape and contains many overlapping identities including as a place of governance, a forum for public engagement, a place of pilgrimage, a setting for national rituals and celebrations, and as a monument to Canadian achievements and sacrifices.

Both the CB building and adjoining Peace Tower require significant rehabilitation in the very near-term as many of their major systems and components will be at risk of critical failure by 2019. The Project is complex and multi-faceted, with an aggressive schedule, defined budget and high quality standards. The project will be implemented in a fast tracked construction management delivery model. Integrated and proactive delivery of project management support services from Contract Award to Project completion is essential to the Project's ultimate success. Additional background information regarding the Project can be found in Appendix A to this Annex.

1.3 Terms, Acronyms and Abbreviations

Specifically defined terms, acronyms and abbreviations used in this SOW are capitalized and defined in Appendix B to this Annex.

1.4 Reference Documents

There are numerous reports and reference materials for the Project that will be made available to the PMSS Contractor following Contract award. The PMSS Contractor must ensure that its resources have reviewed and understand the reports and reference materials for the Project that are relevant to the tasks and duties of the particular resource. The reports and reference materials for the Project are listed in Appendix C to this Annex.

2.0 KEY PROJECT DETAILS

2.1 Project Scope

The scope of the Project includes:

1. The full rehabilitation of CB, approximately 55,000 square meters;
2. Integration of existing and new building systems with the CB underground services (CBUS) and the previously rehabilitated LoP;
3. The construction of the approximately 23,000 square meters of phases 2 and 3 of a multi-level (public concourse, infrastructure and materials handling) VWC Complex that connects phase 1 located near the West Block with the CB and East Block, including the modification of space and systems as required for the operations of the East Block;
4. Site and building elements in accordance with approved master plans, including alterations as needed in West Block, VWC phase 1, East Block, LoP, and the grounds; and
5. All enabling projects.

In fulfilling the PMSS function, the PMSS Contractor must proactively provide services to Public Works and Government Services Canada (PWGSC) to ensure the Construction Manager (CM) and Architectural and Engineering (A&E) Consultant services are being fulfilled as per their respective contracts. The PMSS Contractor reports to the Departmental Representative (DR) and other PWGSC Project Team members as directed by the DR. Implementation for the Project will be achieved through holistic, prioritized, integrated, coordinated and managed design with sequential tendering and construction of multiple Design Packages (DP). Design decisions will require substantiated assessment of the viability of the design proposal and cost and schedule benefit established by the CM. The ideology of integrated project delivery and lean construction will be applied throughout the delivery of the Project. Active management by all members of the Project Team must provide an ongoing assessment and when required revision to workflow and processes.

2.2 Constraints and Challenges

The Project schedule is highly compressed. The construction aspect of the schedule is the most vulnerable element. The Project Team must do everything within its ability to achieve every planning and approval milestone to meet or shorten the overall schedule. Attention to detail and daily follow-up during design, construction, building components and connectivity (BCC) implementation, commissioning, and Project close-out is essential.

2.3 Cost Management Objectives

Deliver the Project within the limits of its authorized funding, and, while substantiating the viability and cost benefits of design choices, respect and enhance the building and associated landscape symbolic values while utilizing best practice conservation standards.

2.4 Time Management Objectives

Deliver the Project within the established time limits to allow CB re-occupancy, permitting the full function of Parliament in its traditional location, and deliver an integrated Project where the Project Team proactively prioritizes its work and manages its resources to achieve the prescribed milestones.

2.5 Quality Objectives

The rehabilitated CB must meet the functional and operational needs and standards of the Clients/Users. The entire design, rehabilitation and construction must allow for efficient and economical repairs, with particularly close attention being paid to heritage details. Maintaining the iconography and balancing cost with quality work to preserve and maintain the various heritage aspects of the building is extremely important.

2.6 Project Team Roles and Organization

The Project Team must manage and implement the Project in a collaborative manner. All members of the Project Team are required to work cooperatively at every stage of the design and construction process to ensure a successful end result. All team members are responsible for establishing and maintaining a professional relationship.

2.6.1 PWGSC Property Manager

The PWGSC Property Manager is the building operator and manager. The PWGSC Property Manager and members of the Buildings in Transition (BIT) team are present on the Project Team to ensure the PWGSC facility management requirements are identified and incorporated into the Project. The PWGSC Property Manager and BIT team will play an active role during the functional programming and commissioning of the Project.

2.6.2 Parliamentary Precinct Security Office

The PWGSC Parliament Precinct Security Office (PPSO) will be the central point of contact for security clearances. All personnel employed on this Project will be subject to a security check and must conform to the security requirements stipulated in the Contract. Only personnel with a valid security clearance will be permitted to provide services for this Project.

2.6.3 PWGSC Design Manager

The PWGSC Design Manager is responsible to lead a team of technical resources, which includes a broad range of professional disciplines. These resources will be embedded within the Project office.

The Design Team provides expert advice on coordination and quality assurance for architectural, conservation, engineering and interior design and other disciplines.

2.6.4 Conservation Management Team

The conservation management team (CMT) is the interdepartmental advisory group, reporting to the DR, consisting of representatives from PWGSC'S Heritage Conservation Directorate (HCD), the Canadian Conservation Institute and the Dominion Sculptor (DS). The CMT will review and validate all decisions associated with in-situ and off-site work to Heritage Assets, as well as any new work that impacts heritage values and character defining elements associated with the site and the building. Through the DR, the CMT will provide clarification and direction to the A&E Consultant and the CM, including direction to address the recommendations received from review and approval authorities as it pertains to heritage conservation.

2.6.5 PWGSC Commissioning Manager

The PWGSC Commissioning Manager is responsible to oversee all base building commissioning activities during the design, implementation and post-construction stages of the Project, assuring that all Project issues are addressed. Responsibilities include the review and input into the approval of the commissioning reports, commissioning plans and input into the evaluation reports.

2.6.6 Cost/Time/Risk Management Services Consultant

The Cost/Time/Risk Management Services Consultant's (i.e. Cost/Time/Risk Consultant) role is to support PWGSC with managing the Project schedule and costs, respectively. They act as independent third party assessors of the A&E Consultant and CM's cost and schedule management services, under the direction of the DR.

2.6.7 Third-Party Design Review

The A&E Consultant's structural and seismic design, heritage conservation strategy, and other aspects of its design will be reviewed throughout the Project by a board of third-party peer review experts retained by PWGSC. Approval of any aspect of the design, overall design and conservation strategy is contingent on the consensus approval between the A&E Consultant, third-party peer review panel, and PWGSC.

2.6.8 Carleton Immersion Media Studio

PWGSC has engaged the Carleton Immersion Media Studio (CIMS) in order to initiate and support innovation in design and construction. CIMS is an interdisciplinary research group at Carleton University, reporting to the DR. CIMS will work with PWGSC in developing new applications, workflows and training for the use of digital technologies in A&E rehabilitation and conservation.

2.6.9 Architectural and Engineering Consultant

The A&E Consultant is responsible to provide design and engineering services for the Project to PWGSC as set forth in the A&E Project Brief and in accordance with the A&E contract. The A&E Consultant will obtain, or cause to be obtained, all federal, municipal and other government regulatory requirements and approvals necessary for the Project.

2.6.10 Construction Manager

The CM is responsible to provide the construction related advice during the planning, design and DP documentation phases, and to provide construction management during tendering, award and execution. The CM is leading the construction team that is composed of its own forces, all sub-trades and specialty conservation trades retained by the CM, as set forth in the CM Terms of Reference and in accordance with the CM contract. Tendering and award of all trade, conservators and selected BCC packages is the CM's responsibility.

The CM is in charge of the construction sites. Construction site health and safety rules will be established and enforced by the CM. All individuals working on the site, including members of the Project Team, must respect the health and safety rules established by the CM and must participate in a site training and orientation program before being permitted access to the site.

The CM formally reports to the DR in all contractual matters. The CM forms part of the Project Team and participates in meetings and workshops, provides constructability advice and provides the requirements for construction phasing and DP content and sequencing.

2.6.11 Clients/Users

The Clients/Users include the Senate of Canada (Senate), the House of Commons (HoC), the LoP and PWGSC.

2.6.11.1 The Senate

The Senate is represented by a Senior Project Advisor who is responsible for the coordination of occupancy planning, functional programming, design, fit-up, BCC and move management. This person is the single point of contact responsible for all internal management and communication of the Project within the Senate. The Senate has exclusive authority to establish its internal accommodation standards and requirements as per the *Parliament of Canada Act*.

2.6.11.2 The House of Commons

The HoC is represented by a Senior Program Coordinator who is responsible for the coordination of occupancy planning, functional programming, design, fit-up, BCC and move management. This person is the single point of contact responsible for all internal management and communication of the Project within the HoC. The HoC has exclusive authority to establish its internal accommodation standards and requirements as per the *Parliament of Canada Act*.

2.6.11.3 The Library of Parliament

The LoP is represented by the Senior Director, Public Education Programs, who is responsible for the coordination of occupancy planning, functional programming, design, fit-up, BCC and move management. This person is the single point of contact responsible for all internal management and communication of the Project within the LoP. The LoP has exclusive authority to establish its internal accommodation standards and requirements as per the *Parliament of Canada Act*.

3.0 REQUIREMENTS

3.1 Scope

The PMSS Contractor must proactively provide project management and support services on a daily basis for the Project as set forth in this SOW, under the direction of the DR. This requires direct communication with the Project Team and DR to enable the discussion and resolution of technical issues.

The delivery philosophy for the Project is one of shared commitment to collaboration, open communication, mutual respect and trust, early involvement of key members and collaborative decision making. The PMSS Contractor is expected to take the initiative to work in a leadership role, making decisions and directing others when required to ensure that the Project moves forward on-schedule and on-budget while respecting this philosophy.

The PMSS Contractor must remain professional at all times while carrying out its role of ensuring the smooth and orderly communication of Project requirements throughout Contract duration. The PMSS Contractor will foster a culture of open and collaborative dialogue that supports innovative ideas and continual information sharing in order to achieve project goals and objectives (see Appendix A to this Annex).

The PMSS Contractor reports to the DR and other PWGSC Project Team members as directed by the DR. If conflicting information is provided to the PMSS Contractor by any Team Member or if issues arise that cannot be resolved, then the PMSS Contractor must seek clarification from the DR.

These services generally include::

- a) Comprehensive Project leadership, management and administration services;
- b) Quality assurance management;
- c) Change order management and control support, including unique Parliamentary Precinct Branch (PPB) approval processes;
- d) Comprehensive Project monitoring and reporting;
- e) Communications and technical writing for written reports and presentations;
- f) Documents and records management;
- g) Support security clearance and building access processes; and
- h) Collaboration tool management, such as Buzzsaw, or other similar systems.

3.2 Media

The PMSS Contractor and any entity or person contracted or employed by the PMSS Contractor must not respond to any requests for information, interview, or questions directly or indirectly from the media pertaining to any aspect of the Project unless specifically requested to do so by the DR. All such inquiries must be directed to the DR without response to the inquiry.

3.3 Response Time

The PMSS Contractor must respond to communications made during working hours from the DR within 12 hours of receipt of said communications.

3.4 Official Languages

The Contractor's resources must be able to communicate effectively in English both written and orally. In addition, a minimum of one Senior Project Manager and one Intermediate Technical Project Administrator / Information Management Specialist must be able to provide bilingual services both written and orally. For written material, the PMSS Contractor is required to ensure that deliverables requested to be produced in both official languages are of a professional standard, and is responsible for the accuracy, completeness and consistency of translation. Both languages are considered equal in status, that is, neither is considered to be of lesser standing because it is a translation of the other.

3.5 Project Office

The Project Team will be co-located and work full time in a shared Project office located in Ottawa, Ontario, in order to collaborate and establish strong lines of communication between Project Team members. PWGSC will advise the PMSS Contractor of the office location

at Contract Award. PMSS Contractor resources at less than 100% level of effort, as set out in section 3.6, are not expected to work in the Project office all of the time.

The Project Team will be provided with the necessary technology to proactively manage the Project design and construction to advance the Project, while ensuring that security of information and personnel are maintained. Basic office furniture, all computers, software, and printers will be provided for the Project Team while working in the Project office, at the discretion of the DR. PWGSC will not charge the PMSS Contractor rent for the work space. The PMSS Contractor must provide all PMSS Contractor resources working under this Contract with cellular phones, inclusive of phone and data services.

The Project office will be the central area for Building Information Modeling (BIM) coordination and management. A BIM technology-enabled room will be provided for the Project Team's use and review of the Model being designed for CB and its surrounding site. Coordination and planning activities will take place in an integrated environment. The BIM Room will be in the Project office on or near the site, depending on the phase of the Project and available options.

3.6 Level of Effort

From time to time, overtime will be required of some PMSS Contractor resources. Similarly, some PMSS Contractor resources will be required to work shift work (evenings and weekends). This may result in a change to the overall required level of effort of the PMSS Contractor resources.

3.7 PMSS Contractor Resources Requirements

The following table outlines the categories of required PMSS Contractor resources that the PMSS Contractor must provide as part of the Contract and may be required to provide through task authorizations, the estimated level of effort (i.e. time commitment requirement) per category, the phased approach for bringing personnel on-board the Project Team, and the estimated total number of PMSS Contractor resources necessary for the duration of the Contract. PMSS Contractor resources will be engaged via a phased in approach as determined by the DR. The PMSS Contractor must have qualified resources available for each resource category for the duration of the Contract.

Section 3.8 PMSS Contractor Resources Requirements, contains the description of tasks for each required PMSS Contractor resource category. Optional PMSS Contractor resources, if needed, are described in section 3.89 Optional Services. Any tasks to be performed by the PMSS Contractor's optional resources and those additional resource categories identified at section 3.7 PMSS Contractor Resources Requirements, as well as the quantity of those PMSS Contractor resources and level of effort expected of them, will be determined on an as and when needed basis by the DR in accordance with Appendix D to Annex A – Tasking Assessment Procedures.

| Required resource category | % Level of Effort | Phased approach for engaging PMSS Contractor resources in initial Contract years | | | | Total estimated number of PMSS Contractor resources |
|--|-------------------|--|---------------|---------------------------|---------------------------|---|
| | | Contract award | April 1, 2017 | 2018/2019 (subject to TA) | 2019/2020 (subject to TA) | |
| Team Leader | 100 | 1 | 0 | 0 | 0 | 1 |
| Senior Project Manager | 100 | 2 | 2 | 1 | 2 | 7 |
| Senior Mechanical and Commissioning Project Managers | 50 | 1 | 0 | 1 | 0 | 2 |
| Intermediate Project Manager | 100 | 0 | 2 | 0 | 2 | 4 |
| Intermediate Technical Project Administrator / Information Management Specialist | 100 | 2 | 0 | 2 | 0 | 4 |
| Senior Technical Writer | 50 | 0 | 1 | 0 | 0 | 1 |
| Intermediate Technical Writer | 100 | 1 | 0 | 0 | 0 | 1 |
| Senior Art Handling Specialist | 100 | 0 | 1 | 1 | 0 | 2 |
| Professional Photographer | 20 | 0 | 0 | 1 | 0 | 1 |
| Total required PMSS Contractor Resources | | 7 | 6 | 6 | 4 | 23 |

3.7.1 PMSS Contractor Required Resources Team Leader

The PMSS Contractor must provide the services of a PMSS Team Leader. The Team Leader shall be the PMSS Contractor's main point of contact with the DR. The Team Leader shall be responsible for the coordination of all PMSS Contractor services. The Team Leader must report to and work closely with the DR to ensure that the Project objectives are met. All PMSS Contractor resources must report to the Team Leader.

The Team Leader must take an active management approach to providing overall leadership, direction and support. The Team Leader shall be responsible for overseeing the quality of all PMSS Contractor services and deliverables by all PMSS Contractor resources, as well as overseeing processes set forth for the Project by PWGSC. The Team Leader shall be responsible for, but is not limited to:

- Actively managing, planning and directing PMSS Contractor required resources using a strong team leadership approach to human resource management;
- Prioritizing and assigning PMSS tasks while reviewing the coordination of these tasks during Project delivery, and assessing and leveraging efficiencies by creating and

maintaining a responsibility assignment matrix, or RACI matrix for short (responsible, accountable, consulted and informed), to assist with providing analysis and expert advice for integrated Project management;

- c) Assessing PMSS Contractor Required Resources performance;
- d) Communicating with the PMSS Contractor resources to ensure commitment to the Project's objectives;
- e) Resolving any internal PMSS Contractor resources conflicts that may arise;
- f) Developing work plans, analyzing and managing schedules, monitoring and reporting on Project progression, developing and implementing approved measures to respond to changing circumstances and ensuring achievement of scope and quality requirements;
- g) Preparing and presenting findings, status and other relevant matters regarding the Project as required (e.g. reports for Treasury Board, presentations for senior management, briefing notes, etc.);
- h) Formulating and preparing Project approval documents;
- i) Developing communication products and plans;
- j) Chairing meetings with Clients/Users, team members and other managers, consultants and Project Team to review and analyze the delivery of Project requirements;
- k) Managing the implementation of the Project, in conjunction with the A&E Consultant, CM, and Cost/Time/Risk Consultant, to identify, analyze, plan, track and control the Project's progress and risks on a continuous basis;
- l) Managing Project changes in accordance with the change management process, adjusting to meet changing requirements, minimizing risk and optimize resource utilization;
- m) Providing advice and leadership in the development and assessment of potential options on the Project development to the DR, recommending a preferred option to the DR including details and required controls, and developing an implementation strategy through the preparation of a business case or feasibility study, as required by the DR;
- n) Obtaining, analyzing and synthesizing information from various parties involved in the delivery of the Project and developing reports and briefing materials, including identification of issues together with recommendations, to address identified issues;
- o) Ensuring that Clients/Users are aligned on key performance metrics, establishing realistic business goals, and providing accountability through reporting and analytics, and providing optimized strategies moving forward;
- p) Formally raising problems, issues or concerns encountered to the DR during any stage of the Project, establishing mechanisms, processes, procedures or options to solve these issues and obtain any necessary approvals by the DR
- q) ;
- r) Advising PWGSC management on a range of issues affecting the organization's ability to achieve the Project's business objectives; and
- s) Supporting the DR and PWGSC project managers with providing updates and briefings to senior management on Project progress and concerns.

3.7.2 Senior Project Manager

The PMSS Contractor must provide the services of a Senior Project Manager. The Senior Project Manager must provide direct project management of the more complex aspects of the Project. The Senior Project Manager will work closely with PWGSC project managers, as

well as the CM, the A&E Consultant and their sub-contractors. The Senior Project Manager must report to the Team Leader and functionally support the PWGSC project managers on specific aspects of the design, construction and conservation.

The Senior Project Manager shall participate in Project development, Project identification, Project delivery, technical Project management and technical administration support by working with the Project Team to provide integrated Project management services.

1. The Senior Project Manager shall be responsible for, but is not limited to: Executing assigned PMSS tasks in an efficient and effective manner, making decisions as required within the PMSS Contractor's authority in order to move the Project forward;
2. Supporting and assisting the Team Leader as required;
3. Developing necessary Project documentation (e.g. briefing notes, status reports, Project plans, etc.) as required for the PWGSC Project Team;
4. Developing crisis and emergency communication and/or management planning strategies;
5. Leading and managing aspects of the Project (enabling Projects, DPs, etc.);
6. Assisting the PWGSC Project managers and the Design Team in interpreting and in understanding PWGSC and/or other federal government departmental standards and policies;
7. Coordinating and integrating the input of and reporting from the Cost/Time/Risk Consultant throughout the delivery of the Project;
8. Coordinating and ensuring the complete integration of scope throughout the design process and within all DPs; working with the DR and PWGSC Project managers, A&E Consultant, CM and Clients/Users for the timely delivery of the Project in accordance with approved deadlines and milestones;
9. Reviewing and inspecting design documents as well as construction and conservation work that are in progress and ensuring compliance with applicable mandates;
10. Assessing the value of services or progress of work completed by the CM and A&E for the DR in order to determine payment; and
11. Investigating requested design, construction or conservation changes by other contractors and making recommendations to the DR on the issuance of contemplated change notices (i.e. potential changes to the original scope which may result in additional costs) to the CM and A&E Consultant contracts

3.7.3 Senior Mechanical and Commissioning Project Manager

The PMSS Contractor must provide the services of a Senior Mechanical and Commissioning Project Manager. The Senior Mechanical and Commissioning Project Manager's role is to support the PWGSC Project Team and support the Senior Project Manager in its duties to the PWGSC Project Team as listed under section 3.9.2, Senior Project Manager, where specific subject matter requires the role of a specialized and experienced professional in the areas of mechanical design, controls, and holistic building systems commissioning, as directed by the DR. .

3.7.4 Intermediate Project Manager

The PMSS Contractor must provide the services of an Intermediate Project Manager. The Intermediate Project Manager's role is to support the PWGSC Project Team and support the Senior Project Manager in its duties to the PWGSC Project Team as listed under section 3.9.2, Senior Project Manager, where judgment and experience of Project situations do not require the level of analysis and interpretation that a Senior Project Manager would commonly provide, as directed by the DR.

3.7.5 Intermediate Project Administrator/Information Management Specialist

The PMSS Contractor must provide the services of an Intermediate Technical Project Administrator and Information Management Specialist. The Intermediate Technical Project Administrator and Information Management Specialist must work interchangeably to provide seamless, direct administrative and information management support to the Project Team, as directed by the DR. The Intermediate Technical Project Administrator and Information Management Specialist shall be responsible for, but is not limited to:

1. As directed by the Team Leader, revising and updating the PMSS Contractor resources work plans at minimum semi-annually;
2. Arranging and managing Project meetings, including taking and distributing meeting notes and minutes in accordance with section 3.10, Deliverables; ;
3. Assisting with the preparation of Treasury Board submissions, Project briefing notes, progress status reports, Project quality reports, monthly reports, quarterly reports, formal statements of work, work breakdown structures and evaluation materials;
4. Using and managing on-line collaboration tools;
5. Preparing and coordinating documentation in response to reports and observations to update management on Project progress;
6. Contributing to research and analysis and carrying out fact finding activities for Project and/or discipline areas;
7. Acquiring, reviewing, recording, verifying and maintaining input extracts, various data and information;
8. Coordinating responses to internal and external inquiries, performing administrative tasks and participating in decision-making related discussions related to the planning and organization of work activities;
9. Assisting the PWGSC Project Team with coordinating the preparation of *Access to Information Act* and *Privacy Act* responses;
10. Providing support services for various office management processes and e-business applications using the MS Office suite, MS Visio, etc.;
11. Developing an information management framework and system for managing the different types of information generated from the Project, including:
 - 11.1. Identifying the Project's information management requirements and working with PWGSC to develop an information management framework and system that will allow for ease of information flow between all parties;
 - 11.2. Ensuring mechanisms are in place to protect document security;
 - 11.3. Assessing data to determine the best methodology for data synchronization, sharing and standardization; and

- 11.4. Interacting with the Project Team to ensure all needs are addressed and any new requirements are appropriately added to the information management framework and system. The information management framework and system must adhere to the requirements of Section 3.11.7, Format and Frequency, and PWGSC's information management requirements (<http://www.tpsgc-pwgsc.gc.ca/biens-property/sngp-npms/ti-it/mpgi-impt-eng.html>) for maintaining, storing, preserving, disposing and destroying information. These requirements may be updated from time to time and it is the PMSS Contractor's responsibility to ensure adherence to current requirements;
12. Preparing a process manual and procedures on how to efficiently and effectively use the information management system following the development of the information management framework and system, but prior to their launch;
13. Developing and providing information sessions to the Project Team on the information management framework and system;
14. Implementing the information management framework and system, including:
 - 14.1. Managing and maintaining electronic files for the Project Team, such as historical recordings, office documents, meeting minutes, reports, files, Drawings (as-built records, etc.);
 - 14.2. Providing advice to the Project Team on record keeping processes, policies and regulations;
 - 14.3. Coordinating information storage requirements;
 - 14.4. interfacing with Shared Services Canada Information Technology (IT) Service Desk; and
 - 14.5. Maintaining an electronic library of reference materials;
15. Managing and updating information management requirements as Project delivery requirements change throughout the Project's lifecycle.

3.7.6 Senior Technical Writer

The PMSS Contractor must provide the services of a Senior Technical Writer. The Senior Technical Writer's role shall be to support the Team Leader and DR, as required and as directed by the DR. The Senior Technical Writer shall be responsible for, but is not limited to:

1. Assisting with the preparation of draft Treasury Board submissions and Project briefing notes;
2. Providing advice and developing documents on current and emerging issues, including briefing materials, position papers, speaking points, policy research, corporate reporting, protocols, media information and presentations related to the Project implementation; and
3. Evaluating and developing National Project Management System (NPMS) approval documentation such as Project Review Advisory Committee (PRAC) presentations and investment analysis reports (IAR).

3.7.7 Intermediate Technical Writer

The PMSS Contractor must provide the services of an Intermediate Technical Writer. The Intermediate Technical Writer's role shall be to support the Senior Technical Writer and the

PWGSC Project Team, as required, with the tasks and responsibilities as outlined in section 3.9.6, Senior Technical Writer, during the various NPMS stages of the overall Project as directed by the DR. The Intermediate Technical Writer shall be responsible for, but is not limited to:

1. Assisting with the preparation, specifically technical content, of Project briefing notes, progress status reports, Project quality reports, weekly reports, monthly reports, quarterly reports, formal statements of work, work breakdown structures and evaluation materials;
2. Preparing and coordinating documentation in response to Project reports and observations for PWGSC project managers;
3. Contributing to research and analysis and carrying-out fact finding activities for the Project and/or various discipline areas;
4. Acquiring, reviewing, recording, verifying and maintaining inputs, extracts, data and information of various types and ensuring conformance to established standards;
5. Drafting written material for PWGSC project managers to respond to internal and external inquiries;
6. Analyzing material, such as specifications (technical statements of work or requirements), notes, Drawings, manuals, user guides and other documents to clearly and concisely explain the requirements; and
7. Gathering information, analyzing the subject and the audience, and producing clear documentation.

3.7.8 Senior Art Handling Specialist

The PMSS Contractor must provide the services of a Senior Art Handling Specialist. The Senior Art Handling Specialist's (SAHS) role shall be to work with the DR and CMT to manage the CB Heritage Assets inventory and to identify and manage stabilization, crating and moving challenges related to the moveable and fixed-removable Heritage Assets in CB as directed by the DR. The SAHS's function will be required mainly during the periods in which the moveable and fixed-removable Heritage Assets are removed and reinstalled in the CB, but is subject to change. The Senior Art Handling Specialist shall be responsible for, but is not limited to:

1. Analyzing, monitoring and reporting on the A&E Consultant's inventory and related documentation of the CB Heritage Assets;
2. Providing advice and recommendations related to Heritage Assets database management;
3. Analyzing, monitoring and reporting on the moveable and fixed-removable Heritage Assets move plan and the actual stabilization, crating and move process (logistics, asset tracking, etc.); and
4. Coordinating moveable and fixed-removable Heritage Asset stabilization, crating, and move process as well as the move of the Library of Parliament's main collection.

3.7.9 Professional Photographer

The PMSS Contractor must provide the services of a Professional Photographer. The Professional Photographer's role shall be to support the DR and document the progress of the Project implementation. The Professional Photographer shall be responsible for, but is not limited to:

- a) Conducting field reviews of the construction site(s) in order to understand the progress of construction;
- b) Planning and coordinating photographic work with the Team Leader and DR to ensure daily, weekly, monthly and seasonal Project activities, events, operational situations are documented at the optimal time – day, night, dawn, or dusk;
- c) planning and taking high resolution photography and videos suitable for use in varying media in order to capture unique lighting, construction, conservation, design and other relevant Project activities or situations on or around the construction site(s);
- d) Planning, creating and maintaining a photographic database using a format compatible with the BIM; and
- e) Preparing presentation decks and mounting/framing photographs as and when required by the DR.

3.8 Optional Services

The quantity of optional PMSS Contactor resources listed below, and the level of effort required of those optional PMSS Contractor resources will be determined by the DR on an as and when needed basis.

If the option to engage an optional resource is invoked, the work plan (see section 3.10.2) must be updated and provided to the DR immediately. Otherwise, the work plan will be updated on a quarterly basis.

3.8.1 Senior Heritage Conservation Specialist

The PMSS Contractor may be required to provide the services of a Senior Heritage Conservation Specialist. The Senior Heritage Conservation Specialist shall work with the DR and CMT to identify and manage potential design, construction and conservation issues.

The Senior Heritage Conservation Specialist shall be responsible for, but is not limited to::

1. Providing heritage conservation advice for proposed conservation work and new contemporary work;
2. Analyzing, evaluating, monitoring and reporting on the proposed heritage conservation options considering the tangible and intangible values of CB, Parliament Hill, its history and possible future in accordance with the *Standards and Guidelines for the Conservation of Historic Places in Canada*;
3. Performing continual on-site inspection, assessment and reporting of all approved conservation work and in-situ protection of Heritage Assets in CB, documenting and reporting to the DR any instance where the scope of conservation work is beyond what is approved;
4. Performing continual inspection, assessment and reporting of conservation work at the off-site storage and conservation facility; and
5. Preparing and presenting documents, presentations and or briefing notes related to the heritage conservation work for the Project.

3.8.2 Intermediate Heritage Conservation Specialist

The PMSS Contractor may be required to provide the services of an Intermediate Heritage Conservation Specialist. The Intermediate Heritage Conservation Specialist shall provide support and services to the Senior Heritage Conservation Specialist in all of its responsibilities and activities as listed under section 3.10.1, Senior Heritage Conservation Specialist, where judgment of and experience with Project situations do not require the level of analysis and interpretation that a Senior Heritage Conservation Specialist would commonly provide, as directed by the DR.

3.8.3 Senior Site Inspector(s) - Electrical, Mechanical, Structural, Architectural, Civil, Municipal, Geotechnical, Environmental, etc.

The PMSS Contractor may be required to provide the services of a Senior Site Inspector in any one of a variety of disciplines. The Senior Site Inspector shall support the DR and PWGSC project managers and Clients/Users on the construction site(s) as directed by the DR.

Within its discipline, the Senior Site Inspector shall be responsible for, but is not limited to:

1. Conducting field reviews and reporting on construction;
2. Participating in construction meetings;
3. Reviewing and analyzing Drawings and specifications;
4. Providing technical analysis and advice on functionality, component and systems integration, and commissioning;
5. Reviewing site and supplementary instructions, contemplated change orders, change orders, expenditure authority requests, and submittals; and
6. Providing daily, weekly and monthly reports on construction progress, including verifying compliance with construction requirements.

3.8.4 Intermediate Expenditure Management Administrator

The PMSS Contractor may be required to provide the services of an Intermediate Expenditure Management Administrator. The Intermediate Expenditure Management Administrator shall support the Team Leader and DR in the role of expenditure management for the Project as directed by the DR.

The Intermediate Expenditure Management Administrator shall be responsible for, but is not limited to:

- a) Verifying and validating if invoices, amendments and change orders are in accordance with the scope and services for all Project contracts (except this PMSS Contract), bringing to the attention of the DR all invoicing errors or anomalies;
- b) Developing a detailed Project expenditure management system within three months of contract award for initial comments by the DR. System approval must be obtained from the DR before implementation and within four months of contract award. The expenditure management system must then be maintained on a continual basis and any system updates or changes approved by the DR prior to their implementation. . The system must include a detailed summary per contract on a fiscal year basis documenting:
 - i. Financial commitments, contract durations, contracted personnel, special conditions, and disbursement allowances;
 - ii. Amendments or change orders;

-
- iii. Actual expenditures;
 - iv. Fiscal year-end and total contract forecasts; and
 - v. Value of work done monthly, annually and over the life of the contract. The 'black book' will be made available upon request from the PWGSC Project Manager or Director and included as an annex to each monthly report;
- c) Analyzing the PWGSC financial system and validating with the DR and PPB finance personnel that the contract commitments and expenditures are properly reflected in PWGSC's financial system;
 - d) Meeting with the DR and PWGSC project managers monthly, or more often as needed, to discuss and document the progress of each contract and the overall Project;
 - e) Preparing customized expenditure management reports on a monthly basis, reconciling and summarizing overall Project financial authorities with actual and forecasted expenditures;
 - f) Working with and responding to auditors, through the DR, when they have questions or concerns regarding the Project expenditures; and
 - g) Providing the DR with electronic copies of the information collected under section 3.9.4(b) on a semi-annual basis.

3.8.5 Senior Interior Designer

The PMSS Contractor may be required to provide the services of a Senior Interior Designer. The Senior Interior Designer shall work closely with the Clients/Users and A&E Consultant to move the functional program forward as directed by the DR.

The Senior Interior Designer must attend meetings as directed by the DR, ensuring the Project vision and guiding principles are upheld. The Senior Interior Designer shall be responsible for, but is not limited to:

1. Reviewing the functional program deliverables and providing technical and design advice;
2. Providing quality assurance reviews of interior design;
3. Providing advice on alternate interior design strategies based on state of the art techniques available;
4. Participating in workshops and Clients/Users group meetings, ensuring that the functional program remains compliant with codes and government policies;
5. Reviewing and facilitating the development of BCC building component DPs and their procurement; and
6. Facilitating receipt of Clients/Users requirements effectively and efficiently.

3.8.6 Food Services Specialist

The PMSS Contractor may be required to provide the services of a Food Services Specialist. The Food Services Specialist shall work closely with the Clients/Users and A&E Consultant to refine functional and operational requirements and validate proposed design solutions that provide value for money, integrating with existing parliamentary food service operations as directed by the DR.

The Food Service Specialist must attend food service related meetings as directed by the DR. The Food Service Specialist shall be responsible for, but is not limited to:

1. Reviewing the food services functional and operational criteria and providing technical and design advice;
2. Providing quality assurance reviews of the food services design;
3. Providing advice on alternate food services design strategies based on state of the art systems as well as component and system integration requirements with existing food service operations;
4. Participating in workshops and Clients/Users group meetings, ensuring that the food services program remains compliant with codes and government policies and is fully compatible with existing systems;
5. Validating construction of and participating in the commissioning of food services systems; and
6. Facilitating receipt of Clients/Users requirements effectively and efficiently.

3.9 Deliverables

3.9.1 Meetings

The PMSS Contractor resources must attend meetings, workshops and working groups on a regular basis, as directed by the DR throughout the duration of the Contract. The Team Leader must ensure the appropriate PMSS Contractor resources are in attendance and must ensure the recording and issuing of meeting minutes as directed by the DR, unless another party is mandated to prepare minutes. The frequency of meetings, workshops and working groups will vary and will be dependent on deliverables, stage of Project, etc.

Types of meetings may include, but are not limited to:

1. PWGSC Project Team and Project Team meetings;
2. PWGSC senior management meetings (i.e. executive level);
3. Project cost, schedule, risk, scope, administration, approval documents, or finance meetings and workshops;
4. Clients/Users meetings, workshops, and working groups;
5. Project design meetings, workshops, and working groups;
6. Project construction meetings, workshops, and working groups;
7. Presentations;
8. Project status and update meetings; and
9. Other meetings as required.

3.9.2 Work Plan

The PMSS Contractor must prepare a work plan that meets the requirements set out in section 3.10.7, Format and Frequency, and will regularly meet with the DR at the direction of the DR throughout the Contract to identify and review the overall Project status and upcoming monthly activities and service requirements.

The initial work plan must be submitted to the DR for review and approval as set out in section 3.10.7. It must include the forecasted PMSS services, resource commitments and deliverables for the first three months, a roles and responsibilities matrix for PMSS Contractor resources and PWGSC project managers, as well as propose the expected

contents of the monthly project management reports (see section 3.10.3, Project Management Reports)

Subsequent work plan updates must include, at minimum:

1. The forecasted services, deliverables, PMSS resource schedules (including evenings and weekends) and PMSS Contract cash flow for the next three, six and 12 months of services;
2. Changes to the roles and responsibilities matrix;
3. The resource succession plan, looking ahead 12, 24 and 36 months;
4. Documented reasons for delayed deliverables or extra costs to date; and
5. Any forecasted extra costs or unanticipated roadblocks, and deliverables that are at risk for the upcoming months.

If the option to engage an optional resource is invoked, the work plan must be updated and provided to the DR immediately. Otherwise, the work plan will be updated on a quarterly basis.

3.9.3 Project Management Reports

The PMSS Contractor must prepare monthly Project management reports that meets the requirements set out in section 3.10.7, Format and Frequency, and will regularly meet with the DR at the direction of the DR throughout the Contract to identify and review the overall Project status and upcoming monthly activities and service requirements.

The initial Project management report must be submitted for the approval of the DR with the initial work plan. Subsequent Project management reports must be submitted to the DR for approval as set out in section 3.10.7. The structure of the monthly Project management reports will be used for the entire Project and the content of the reports may vary according to each Project phase and the corresponding scope and activities. At minimum, the monthly Project management reports must adhere to the following requirements and characteristics:

- a) Include an executive summary of key points, suitable to be utilized as a Project briefing document for the HoC, Senate, LoP and PWGSC senior management;
- b) Consolidate Project activities, highlighting those that are completed, late, ahead of schedule and any new activities that have arisen including: overall progress, key accomplishments, key issues, financial summary, schedule summary and risk summary;
- c) Summarize key Project activities for the current completed month, as well as identify tasks and anticipated deliverables for the next 30, 60 and 90 day periods;
- d) Provide a relevant summary of PMSS activities and project management topics related to the delivery of the Project (e.g. integration, scope management, time management, cost management, quality, PMSS human resources, communications, risk management, procurement, safety, security, environmental, financial and claims), and include copies of updated schedules, plans or other relevant project management documents;
- e) Identify any contractual issues; and
- f) Incorporate relevant Project delivery issues from the A&E Consultant, Cost/Time/Risk Consultant, CM and Clients/Users outlining how identified delivery issues affect:
 - 1.1. The progress to date from each PMSS Contractor resource;
 - 1.2. The top five risk elements encountered by each PMSS Contractor resource with respect to their work due to these issues;

- 1.3. Mitigation measures and the anticipated period for mitigation for these risk elements;
and
- 1.4. Foreseeable resource demands/changes for the PMSS Contractor stemming from these issues.

3.9.4 Scope Management

The PMSS Contractor must develop, implement, and manage a change control procedure inclusive of the Project Team that meets the requirements set out in section 3.10.7, Format and Frequency, and will regularly meet with the DR at the direction of the DR throughout the Contract to identify and review the overall Project status and upcoming monthly activities and service requirements. The change control procedure must reflect the unique approval and documentation requirements in PPB. The change control procedure must be submitted as set out in section 3.10.7 for review and approval by the DR. Subsequent updates must be submitted to the DR for approval as set out in section 3.10.7. At minimum, the change control procedure must:

1. Define and implement reporting mechanisms for proposed and actual change; and
2. Implement a change management process that allows information to be gathered and disseminated in support of timely decision-making. The process must incorporate Clients/Users change requests and their approval, contract amendments, contemplated change notices, site instructions, change orders and other PWGSC and industry standard scope documentation.

3.9.5 Quality Management

The PMSS Contractor must establish a quality management (QM) program inclusive of the Project Team that meets the requirements set out in section 3.10.7, Format and Frequency, and must regularly meet with the DR at the direction of the DR throughout the Contract to identify and review the overall Project status and upcoming monthly activities and service requirements.

The initial QM program report must be submitted as set out in section 3.10.7 for approval by the DR. Subsequent updates must be submitted to the DR for approval as set out in section 3.10.7, and as directed by the DR. At minimum, the QM Program must:

1. Define, monitor and report on the expectations and actual performance or non-performance of the QM program for each Project phase; and
2. Create, maintain and report on a Project-specific decision making log that captures all key decisions, related documentation, dates, individuals responsible for decisions making and, when applicable, dependencies to other Project activities.

3.9.6 Communications

The PMSS Contractor must develop a Project communications strategy inclusive of the Project Team that meets the requirements set out in section 3.10.7, Format and Frequency, and must regularly meet with the DR at the direction of the DR throughout the Contract to identify and review the overall Project status and upcoming monthly activities and service requirements.

The initial Project communications strategy must be submitted as set out in section 3.10.7 for review and approval by the DR. Subsequent updates must be submitted to the DR for approval as set out in section 3.10.7. The Project communications strategy must keep the

Project Team and stakeholders informed during all Project stages (i.e. inception, construction, close-out). At minimum, the Project communications strategy must:

- a) Articulate the communications roles and responsibilities (i.e. who is responsible for communicating what) including how the Project Team and stakeholders will be kept informed (i.e. how);
- b) Describe the planned frequency of communications (i.e. when);
- c) Describe the process to be employed when unplanned issues arise;
- d) Describe consensus building approaches; and
- e) Describe the process for preparing responses to inquiries from media or outside agencies.

3.9.7 Format and Frequency

A PWGSC document management system (i.e. GCDocs) and a Project Team information management system (e.g. Buzzsaw or similar system) will be used on the Project to save, share, and access project documents including PMSS contractor deliverables. Depending on the type of document, they will either be stored in one of these systems, or in both. All formal communications documents between the PMSS Contractor and the Project Team must carry the Contract name and number, PWGSC Project title, PWGSC Project number and date using the format: year-month-day (e.g. 2016-02-10).

All PMSS Contractor deliverables must be prepared in the according format as specified below:

| Deliverable | Required Format |
|-----------------------------|------------------------------------|
| Written reports and studies | MS Word and Adobe PDF |
| Spreadsheets and budgets | MS Excel and Adobe PDF |
| Presentations | MS PowerPoint, Visio and Adobe PDF |
| Schedules | Primavera and/or Microsoft Project |
| Internet | HTML, Macromedia Flash |
| Photos | High resolution, jpeg format |
| Videos | High resolution, jpeg format |

The table below outlines the frequency of required deliverables from all PMSS Contractor resources.

| Frequency | Deliverable | Due Date |
|-----------|--|--|
| Initial | Schedule meeting with DR to discuss work plan development | Within 10 Working Days of Contract Award |
| | Draft work plan forecasting the next three months of services and deliverables | Within 20 Working Days of Contract Award |
| | Revise work plan (if required) | Within five Working Days of receipt of comments from the DR on Work Plan |
| | Draft a sample of monthly Project management report format | Within 20 Working Days of Contract Award |
| | Revise monthly Project management report format (if required) | Within five Working Days of receipt of comments from the DR on the sample monthly Project management report format |
| | Schedule meeting with DR to discuss QM program development | Within 10 Working Days of Contract Award |

| Frequency | Deliverable | Due Date |
|-------------|---|---|
| | and an associated QM report for briefing | |
| | Draft QM program, draft Project-specific decision log and draft a sample format for QM report | Within 20 Working Days of Contract Award |
| | Revise QM program, Project-specific decision log and QM report format (if required) | Within five Working Days of receipt of comments from the DR on QM program and sample QM report |
| | Schedule meeting with DR to discuss communications strategy | Within 10 Working Days of Contract Award |
| | Draft communications strategy | Within 20 Working Days of Contract Award |
| | Revise communications strategy (if required) | Within five Working Days of receipt of comments from the DR on QM program and sample QM report |
| Monthly | Project management report summarizing the actual services and deliverables for the past period | Within five Working Days of the last day of each calendar month commencing the first month after receipt of approval from the DR of the revised sample monthly project management report format |
| Quarterly | Updated work plan forecasting the next three, six, and 12 months of services, deliverables, revisions to PMSS resource schedules and PMSS Contract cash flow work | Commencing the first calendar month after receipt of approval from the DR of the revised work plan and quarterly thereafter |
| | Resource succession plan looking ahead 12, 24 and 36 months | Commencing six months after Contract Award and quarterly thereafter |
| | | |
| | Update QM program report | Submitted with the applicable monthly report |
| | Updated Project-specific decision making log | Submitted with the applicable monthly report |
| | Consolidated report of services and deliverables over the preceding year | At the completion of every 12 month Contract period commencing the first 12 month period after Contract Award |
| | Update communications strategy | Submitted with the applicable monthly report |
| Annual | Meeting minutes | Within two working days of the meeting |
| As Required | Create and submit any required documentation, reports, analysis, briefing notes etc. deemed necessary by the DR | Within the agreed-upon delivery date with the DR |
| | Produce deliverables as deemed necessary from any working group activities | Within the agreed-upon delivery date of the working group, to the approval of the DR. |

Solicitation No. - N° de l'invitation
EP748-151921/B
Client Ref. No. - N° de réf. du client

Amd. No. - N° de la modif.
File No. - N° du dossier
EP748-151921

Buyer ID - Id de l'acheteur
FQ002
CCC No./N° CCC - FMS No./N° VME

| Frequency | Deliverable | Due Date |
|-----------|--|--|
| | Prepare draft Treasury Board submissions or supporting documentation for Treasury Board submissions deemed necessary by the DR | Within the agreed-upon delivery date with the DR |
| | Preparing options analyses and scenarios deemed necessary by the DR | Within the agreed-upon delivery date with the DR |
| | Preparing reports, analysis, plans or communications related to risk deemed necessary by the DR | Within the agreed-upon delivery date with the DR |
| | Preparing feasibility studies, IAR or other NPMS or Project documentation deemed necessary by the DR | Within the agreed-upon delivery date with the DR |
| | | |

Appendix A – Project Background

1.0 Project Objectives

The objectives of the Project are to:

1. Respect and enhance the building's exterior and interior, maintaining its heritage defining character and symbolic values, utilizing best practice conservation standards balanced with opportunities for the respectful expression of contemporary architecture;
2. Provide an appropriate facility with flexible, adaptable and effective systems, components and technologies that support the occupants in the conduct of their business, meeting the operational and functional requirements of a modern Parliament;
3. Ensure the rehabilitation is consistent with the long-term development plans for Parliament Hill;
4. Ensure rehabilitation is completed in a timely, cost-effective manner, meeting the requirements of the occupants and visitors by respecting approved scope and quality objectives;
5. Rehabilitate Centre Block so that it respects and reflects the dignity and integrity of the Parliament of Canada;
6. Ensure rehabilitation reflects, responds and enhances historic and contemporary Canadian identities and values; and
7. Ensure that the appropriate level of security is incorporated into the design, rehabilitation and construction in a balanced, layered approach, alleviating a risk to accessibility or visual distraction from the heritage characteristics of the building and its surroundings.

2.0 Project Culture

PWGSC will manage this Project within a heightened culture of open, collaborative dialogue that fosters innovative ideas and continual information sharing in order to achieve the Project's goals and objectives. The daily activities and actions of all Project Team members must be performed in accordance with this culture.

Active participation of all Project Team members within a forum that promotes creativity, resourcefulness, collaboration, integration is essential to create a 'can do' approach of doing things.

This Project culture:

1. Promotes team integration and the elimination of silos;
2. Promotes healthy constructive dialogue of engagement;
3. Streamlines and simplifies approval processes in all organizations;
4. Delegates authority to team members where possible;
5. Leverages technology for enhanced communications;
6. Accepts the ongoing development and refinement of requirements;
7. Respects the inevitable reality of change;
8. Encourages innovation within the design;
9. Encourages ownership and responsibility of tasks; and
10. Ensures reactive problem solving and risk based decision making.

3.0 Location

The Centre Block Rehabilitation Project is located on a National Historic Site of Canada located in downtown Ottawa, Ontario. It is adjacent to The Rideau Canal, a registered UNESCO World Heritage Site.

As shown in Figure 1, the proposed location of the primary work extends from the main lawn of Parliament Hill, south of the Vaux Wall, to the north edge of the escarpment overlooking the Ottawa River, and from the west edge of the escarpment to the east edge of the escarpment. Other work will be carried out at remote locations yet to be determined. Significant construction is anticipated to start in 2019, after obtaining numerous design approvals. During the construction period the House of Commons of Canada (House of Commons) will conduct their parliamentary operations from the West Block, with a public entrance from the Visitor Welcome Centre, Phase 1 (VWC1). The Senate of Canada (Senate) will conduct their parliamentary operations from the Government Conference Centre, adjacent to the Rideau Canal. The Senate will also retain and constantly use offices and parliamentary committee rooms in the East Block. The Library of Parliament and Centre Block Underground Services (CBUS) buildings will also be operational during the construction period. Library of Parliament staff will operate from other locations.

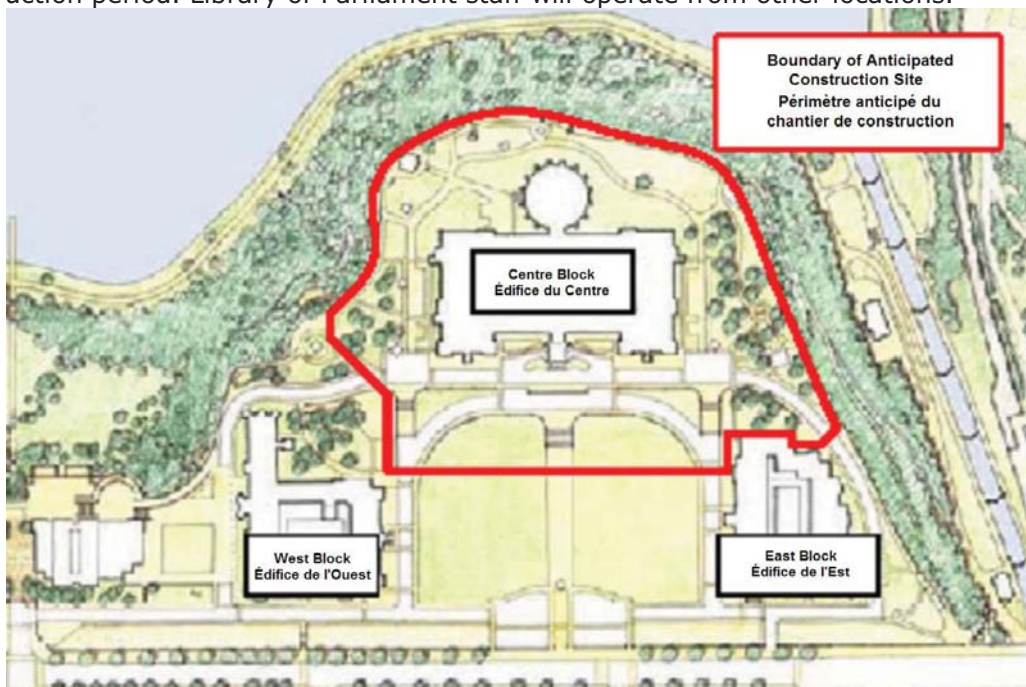


Figure 1 - Anticipated Construction Site

4.0 Parliamentary Precinct and its Long Term Vision and Plan

The Parliamentary Precinct is the home of Canada's parliamentary system and the physical expression of our commitment to democracy and the principle of freedom. The picturesque landscape and architectural style of the Precinct are enduring visual symbols of our country, while the openness, accessibility and security of the public spaces are representative of the values treasured and celebrated by all Canadians.

The Precinct provides the setting for the work of Parliamentarians and staff in a secure and efficient manner, but it is also the preeminent gathering place for public expression and celebration, as well as a place of quiet reflection.

Change within the Parliamentary Precinct needs to occur in a way that balances the evolving functional needs of parliamentarians and other users with the overriding commitment to preserve the historic, environmental and symbolic primacy of the site. The combination of careful conservation and appropriate contemporary interventions will create a more ecological and sustainable building and a stronger connection to its remarkable setting.

1. The Internet contains information about the Parliamentary Precinct at:
<http://www.tpsgc-pwgsc.gc.ca/collineduparlement-parliamenthill/index-eng.html>;
2. Information about Centre Block as well as informative videos at:
<http://www.parl.gc.ca/Visitors/index-e.html>;
3. The Long Term Vision and Plan (LTVP) publication Building on a Solid Foundation at:
http://publications.gc.ca/collections/collection_2013/tpsgc-pwgsc/P4-51-2007-eng.pdf;
4. The National Project Management System (NPMS) model which PWGSC follows:
<http://www.tpsgc-pwgsc.gc.ca/biens-property/sngp-npms/bi-rp/mdl-description-eng.html>
5. Information for the Federal Heritage Buildings Review Office (FHBRO) can be found at the following websites:
 - 5.1. Parliament Hill, Centre Block:
http://www.pc.gc.ca/apps/dfhd/page_fhbro_eng.aspx?id=2833
 - 5.2. Parliament Buildings National Historic Site of Canada:
http://www.pc.gc.ca/apps/dfhd/page_nhs_eng.aspx?id=471
 - 5.3. Public Grounds of the Parliament Buildings National Historic Site of Canada:
http://www.pc.gc.ca/apps/dfhd/page_nhs_eng.aspx?id=470
 - 5.4. Parliament Hill, Complex:
http://www.pc.gc.ca/apps/dfhd/page_fhbro_eng.aspx?id=2834
 - 5.5. Parliament Hill, Grounds:
http://www.pc.gc.ca/apps/dfhd/page_fhbro_eng.aspx?id=2835

5.0 Project Description

The Centre Block is at the very heart of Canada's political and cultural landscape. It represents the rich history of this country, as well as its contemporary hopes and dreams. As the institutional home of Canada's system of parliamentary democracy, it embodies the achievements and challenges of a bilingual, pluralistic society. Its setting, within the extraordinary landscape of Parliament Hill, reminds us of the powerful intersection of history and geography that define Canada's identity, and that compel us to consider an ecological and sustainable future for this place and for the world.

The Centre Block contains many overlapping identities - as a place of governance, as a forum for public engagement, as a place of pilgrimage, as a setting for national rituals and celebrations, as an example of beautifully integrated design and craftsmanship, as a monument to Canadian achievements and sacrifices, as the focus of a capital city and of a country.

The Centre Block is the core component within the Parliament Hill complex, occupying a central position between the East Block, the West Block, the Library of Parliament and the emerging Visitor Welcome Centre. The Gothic Revival style of the original mid-19th Century building was specifically chosen to allow a rich and complex relationship between the wilderness escarpment to the north and the great lawn to the south. In its rebuilding after the disastrous 1916 fire, the exterior style was maintained and a new Beaux-Arts interior created to update the building and allow an increased public presence. It displays a multitude of stone carvings, including gargoyles, grotesques and friezes in keeping with the Victorian High Gothic style. The building is connected with the Peace Tower, built between 1919 and 1927, and the Library of Parliament. It houses the Senate and House of Commons Chambers and offices of numerous Senators, Members of Parliament and senior administration or both legislative houses, as well as many ceremonial spaces such as the Hall of Honour, the Memorial Chamber and Confederation Hall.

Major renovations were first proposed in the 1960's. At that time the original mechanical and electrical systems were already more than 40 years old. Nothing was done for another nine years when a basement fire prompted improvements to the life safety systems. In the mid-1970s, a complete rehabilitation was proposed but was postponed; however emergency exiting from the Peace Tower was improved. By 1998, the CBUS had been constructed. This facility included underground electrical switchgear, transformers, emergency power generation and centralized IT facilities as well as storage and support space for the House of Commons. It also provided limited improvements to House of Commons material handling capability.

Since 1999, only emergency repairs and regular maintenance have been undertaken to allow continued occupancy of the building. The last significant rehabilitation was the repair to the Peace Tower and south façade, completed in the late 1990s. Repairs to the building such as the courtyard parapets and some of the penthouses have been completed and other similar interventions are ongoing.

The Centre Block, including the Peace Tower, requires significant rehabilitation in the very near-term as many of its major systems and components will be at risk of critical failure by 2019, with total failure predicted by 2025. Due to the interdependencies of the Centre Block building systems, it must be decommissioned at one time and emptied before any invasive work can begin. A challenging aspect of this Project's scope will be to integrate the VWC Complex, aligning the LTVP's direction for a connecting concourse spine for pedestrian movement and independent but connected material handling facilities.

6.0 Project Elements

6.1 Centre Block

The following outlines the scope of work for the complete rehabilitation of Centre Block and the Peace Tower. The outline is only to provide the reader with guidance as to the degree of undertaking and complexity and should not be considered an exhaustive list:

1. Security/Asset Condition

- 1.1. Restoration of the building envelope, including selective security mitigation measures to the extent possible given the building's heritage designation; and
- 1.2. Seismic upgrade in accordance with the 2015 National Building Code of Canada, to the extent possible given the building's heritage designation. The structural

systems for Centre Block are situated for the most part on bedrock and consist of:

- 1.2.1. Reinforced concrete beams and slab supported on reinforced columns and unreinforced concrete walls and piers;
- 1.2.2. Steel beams and girders bearing on interior unreinforced brick masonry walls and exterior unreinforced brick masonry walls with an integral outer width of stone; and
- 1.2.3. Skeleton frames of steel girders framed into steel columns on steel or cast-iron bases embedded in concrete and masonry with unreinforced masonry infill walls;

2. Building Operations

- 2.1. Excavation of the basement subject to viability and cost benefit to add space for building support functions; and
- 2.2. New mechanical, electrical, and vertical transportation systems.

3. Functional Requirements

- 3.1. New information technology (IT), multimedia and security systems;
- 3.2. Additional parliamentary office suites and additional broadcast capable committee rooms;
- 3.3. Adjustment to the Senate Chamber and the House of Commons Chamber to allow for additional seating;
- 3.4. Complete fit-up of the building, including special purpose space (e.g. Chambers, Committee Rooms, and support space, cafeteria, etc.); and
- 3.5. Furniture, fixtures and equipment;

4. Heritage Requirements

- 4.1. Restoration of more than 50 designated heritage spaces such as Salle de la Francophonie, Hall of Honour, Reading Room, etc.;
- 4.2. Specialized art handling for the removal, storage and return of over 20,000 Heritage Assets and the main collection of the Library of Parliament;
- 4.3. Conservation of fixed and moveable Heritage Assets; and
- 4.4. Significant conservation of exterior and interior masonry, wood, plaster, paint, art glass, fabric and metals.

6.2 Visitor Welcome Centre Complex

The first phase of the VWC Complex is currently under construction and is situated west of the Vaux Wall, between the Centre Block and the West Block. Building on the approved three level design of VWC1, the remainder of the VWC Complex is proposed within the scope of the Centre Block Rehabilitation Project, built underground in front of and connected to the Centre Block, VWC1, and to East Block. The upper level will include a secure public concourse and Visitor Experience Centre. The middle level would carry some or most of the infrastructure needed to service Centre Block and the surrounding site, and the lowest level would function as a material handling and building support corridor providing a secure and efficient pathway serving the Centre, East and West Blocks. This will connect to a future entry portal, yet to be determined.

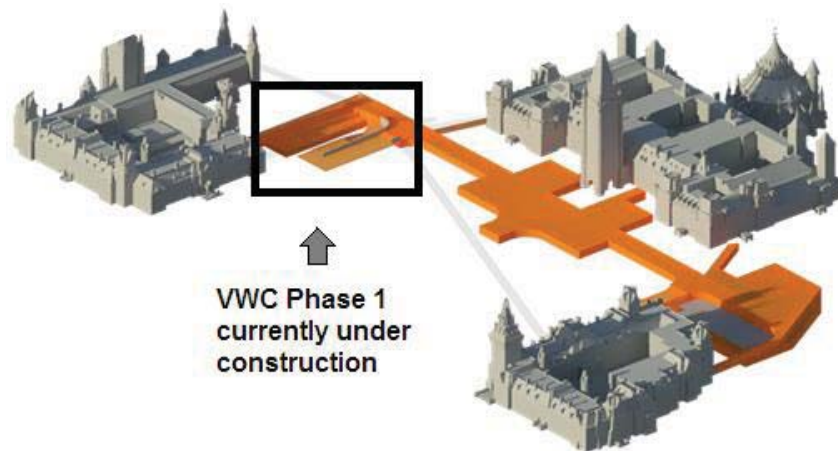


Figure 2 - Visitor Welcome Centre Complex

1. Functional Requirements

- 1.1. Visitor services (information and orientation, security screening and marshalling, education and public programs and other services;
- 1.2. Material handling connecting the buildings of the Parliamentary triad; and
- 1.3. Building support services;

2. Building Operations

- 2.1. Utility corridor; and
- 2.2. Building systems for the VWC Complex, Centre Block, Peace Tower, East Block and the broader Parliamentary Precinct.

6.3 Site Requirements

The Project site is to be carefully transitioned to construction operations as the building is decanted. The final site development must be reflective of its national historic nature. This effort includes:

1. Decommissioning of site systems and the completion of numerous interconnected enabling Projects, including signage and wayfinding in downtown Ottawa;
2. Extensive architectural landscaping and architectural lighting for Parliament Hill; and
3. Security requirements.

6.4 Construction Management Project Delivery

PWGSC has opted for a fast-tracked Construction Management delivery method, with the Construction Manager at risk and responsible for tendering the work and for the construction cost and schedule.

Project implementation must enhance critical decision making in order to prioritize the design and interim approvals, allowing construction to start early and in an optimized sequence. The cost benefit of this approach has a significant impact to the cash flow and overall Project cost. This implementation approach is routinely adopted in industry through public-private-partnerships (P3) and design-build (D-B) projects, which are variants of construction management, and is central to the success of the Centre Block Rehabilitation Project. The overall Project is a series of sub-projects, interconnected and dependent upon each other. Enabling projects must be designed and completed in order to decant and decommission the building. Targeted and specialized investigations and materials testing

are essential to inform the structural and seismic design, conservation strategy and other design disciplines. Formal approvals are required to start building decommissioning and construction. The massing, orientation and interconnection of the VWC Complex to adjacent buildings is an integral aspect of achieving functionality and security requirements, while balancing time and cost objectives.

6.5 Investigations

Significant investigation work will be performed concurrently with the progression of the schematic design. Investigations will be carefully planned and implemented in a prescribed manner that maintains the operations of Parliament and provides the necessary information to develop design solutions. Investigations will primarily be limited to occur when Parliament is not sitting.

6.6 Enabling Projects

The Project Team must complete approximately 15-20 enabling projects by early 2019, in advance of performing any substantive construction. These projects range from approximately \$1 million to \$20 million each and have various degrees of complexity and involve a multidisciplinary and multi-trade effort. Many of these projects have a direct relationship with and will occur concurrently with investigation work necessary to inform the main design and obtain design approval. They will include civil and building infrastructure and fit-up within or around Centre Block, as well as other locations in the Parliamentary Precinct and National Capital Region.

6.7 Building Information Modeling

PWGSC is currently creating a 3D BIM model of Centre Block and the surrounding site. The BIM is intended to be updated and enhanced by the entire Design Team over the duration of the Project. The A&E Project Brief will identify BIM requirements throughout the phases of the Project.

6.8 Building Components and Connectivity Program

The BCC program delivers precinct-wide projects that provide the infrastructure and services to implement the connectivity requirements for the Precinct. Components include building fixtures, furnishings and equipment. Connectivity includes interconnected systems for networking, security, multimedia and other electronic communications. BCC is to be installed as part of the Centre Block Rehabilitation Project.

6.9 Project Duration

This significant Project will take between 8 - 12 years to complete depending on the options approved for implementation. Regardless of the options approved, the first two years of the Project are critical when the schematic design must be completed and approved in about 36 months from the award of the A&E Consultant and CM contracts. Formative seismic/structural design options, inclusive of architectural and security impacts, must be completed within 24 months for presentation to approval bodies.

Solicitation No. - N° de l'invitation
EP748-151921/B
Client Ref. No. - N° de réf. du client

Amd. No. - N° de la modif.
File No. - N° du dossier
EP748-151921

Buyer ID - Id de l'acheteur
FQ002
CCC No./N° CCC - FMS No./N° VME

6.10 Project Size

This Project of national significance will be of a size greater than all work progressed to date on the LTVP, and will be similar in complexity, scope and scale with projects such as the Capitol Visitors Centre (Washington, DC), the renovations of the United Nations Headquarters (New York City), and the planned rehabilitation of Westminster Palace (London, UK).

Appendix B – Terms, Acronyms and Abbreviations

The following terms are used in and apply to the Statement of Work:

| | |
|---|---|
| A&E Project Brief | Document detailing the requirements and expectations of the Architectural and Engineering Consultant. |
| Building Information Modeling or Modeling | The process and technology used to create Models. |
| Centre Block | Includes the Centre Block and Peace Tower as an integrated building assembly, unless the Peace Tower is specifically excluded or singled out as a Project element in this statement of work. |
| Clients/Users | Include the Senate of Canada (Senate), the House of Commons (HoC), the LoP and PWGSC. |
| Cost/Time/Risk Management Services Consultant | The entity contracted by Public Works and Government Services Canada to provide independent planning, scheduling, monitoring, control, cost planning, estimating, and quality assurance services directly to Public Works and Government Service Canada. |
| Design Package | The part of the overall Work for the Project that is specific to a limited number of trades or even one trade and is prepared by the A&E Consultant to acquire or construct one or more building element and/or to acquire, construct and install one or more BCC element. |
| Design Team | The combined forces of the Architectural and Engineering Consultant, the Information Technology and Project Management Office, and security. |
| Drawings | The 2D Drawings generated from the Model and traditional 2D Drawings not generated from the Model. |
| GCDOCS | Government of Canada system for saving, finding and sharing electronic information. |
| Heritage Assets | <p>The broad encompassing term used to describe tangible character defining elements and the integrated arts in the Centre Block. They include a range of cultural property managed and cared for by various custodians. They are divided into the following three categories:</p> <ul style="list-style-type: none"> • Movable Heritage Assets: furnishings and other portable assets, e.g. movable furniture, wall-hung fine art, historical material culture and portable sculpture; • Fixed-removable Heritage Assets: heritage elements that are fastened to the base building fabric using screws or other fastening devices which can be easily unfixed, e.g. light fixtures, grilles, radiators, doors, |

| | |
|--|---|
| | <p>demountable wood panels and wall mounted handrails; and</p> <ul style="list-style-type: none"> Fixed Heritage Assets: heritage elements which are fixed or embedded into the building fabric which, if possible to remove, would require extensive effort and careful disassembly, e.g. architectural carving and fine art relief sculpture, woodwork and paneling, decorative painted finishes such as stencil work, mural paintings including frescos, wrought iron metalwork and marble and stone finishes. |
| Information Technology and Project Management Office | Forms part of the House of Commons and provides services to the Senate, the House of Commons and the Library of Parliament. |
| Long Term Vision and Plan | The 25-year plan to conserve the existing historic assets and to provide new facilities and infrastructure to meet the needs of a modern Parliament and the public. |
| Model | A digital representation of the physical and functional configuration, characteristics or attributes of the Project or a portion of the Project. |
| National Project Management System | The National Project Management System (http://www.tpsgc-pwgsc.gc.ca/biens-property/sngp-npms/index-eng.html) is Public Works and Government Services Canada's project management framework for Real Property Projects and Information Technology-enabled projects. The NPMS framework defines key principles and provides the directives, roadmaps, deliverables and tools needed to successfully deliver projects on scope, on time and on budget. |
| Parliamentary Precinct Branch | The sector of Public Works and Government Services Canada who acts as the custodian of the buildings and grounds on Parliament Hill on behalf of Canadians. |
| Project | Refers to the Centre Block Rehabilitation Project and includes all services and work required to fulfill the work described in the Contract. |
| Project Team | The combined private sector and government sector teams responsible for delivering the Project including the Design Team, the Project Management Support Services Contractor, the Schedule and Cost Consultant, the Construction Manager, the Departmental Representative, members of the Buildings in Transition team and the Clients/Users representatives. |

Solicitation No. - N° de l'invitation
EP748-151921/B
Client Ref. No. - N° de réf. du client

Amd. No. - N° de la modif.
File No. - N° du dossier
EP748-151921

Buyer ID - Id de l'acheteur
FQ002
CCC No./N° CCC - FMS No./N° VME

| | |
|------------------------|--|
| PWGSC Project Team | The PWGSC employees working on the Centre Block Rehabilitation Project. |
| Visitor Welcome Centre | A multi-level underground structure located immediately south of Centre Block and extending from the West Block to the East Block, including all required building support systems, functions, and operations for the parliamentary triad- Centre Block, East Block and West Block, as well as visitor services. |

The following acronyms and abbreviations are used in this document:

| | |
|--------|---|
| A&E | Architectural and Engineering Consultant |
| BCC | Building Components and Connectivity |
| BIM | Building Information Model or Modeling |
| BIT | Buildings in Transition |
| CB | Centre Block |
| CBUS | Centre Block Underground Services |
| CIMS | Carleton Immersion Media Studio |
| CM | Construction Manager |
| CMT | Conservation Management Team |
| DP | Design Package |
| DR | Departmental Representative |
| DS | Dominion Sculptor |
| FHBRO | Federal Heritage Buildings Review Office |
| HCD | Heritage Conservation Directorate |
| HoC | House of Commons |
| IAR | Investment Analysis Report |
| IT | Information Technology |
| LoP | Library of Parliament |
| LTVP | Long Term Vision and Plan |
| NPMS | National Project Management System |
| PDF | Portable Document Format |
| PMSS | Project Management Support Services |
| PWGSC | Public Works and Government Services Canada |
| Senate | Senate of Canada |
| SOW | Statement of Work |
| VWC | Visitor Welcome Centre |

Appendix C – Reference Documents

The DR will provide the PMSS Contractor the following documents after Contract Award:

- a) A&E Project Brief;
- b) Construction Manager Terms of Reference;
- c) Cost and Time Management Services Statement of Work;
- d) Information Technology Consultant Statement of Work;
- e) Feasibility Report – Centre Block Rehabilitation Project;
- f) Baseline Investment Analysis Report;
- g) Parliamentary Building – Building Information Report;
- h) Master Schedule and Master Cost Plan;
- i) Implementation scenarios;
- j) Structural, geotechnical and other feasibility studies; and
- k) Supporting CB and LTVP information.

The following websites are also available for online research:

- 1. General information about the Parliamentary Precinct:
<http://www.tpsgc-pwgsc.gc.ca/citeparlementaire-parliamentaryprecinct/index-eng.html>
- 2. General information about the National Project Management System:
<http://www.tpsgc-pwgsc.gc.ca/biens-property/sngp-npms/index-eng.html>
- 3. Information Management Planning Template:
<http://www.tpsgc-pwgsc.gc.ca/biens-property/sngp-npms/ti-it/mpgi-impt-eng.html>

APPENDIX D - TASKING ASSESSMENT PROCEDURE

- 1 Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at Appendix E to Annex A will be provided to the Contractor . Once a draft TA Form is received the Contractor must submit to the Technical Authority proposed resources to supply the requested Resource Categories based on the information identified in the TA Form. The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 5 business day turnaround time to submit a quotation.
- 2 For each proposed resource the Contractor must supply a résumé, the requested security clearance information and must meet the Mandatory Resource Assessment Criteria identified at Appendix F to Annex A applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
 - a) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (Refer to Appendix G to Annex A, Certifications).
 - b) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
 - c) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification diploma or degree, such document, must be current, valid and issued by the entity specified in this Contract or if the entity is not specified the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
 - d) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
 - e) For any requirements that specify a particular time period (e.g., 24 months) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.

-
- f) A résumé must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.
- 3 The qualifications and experience of the proposed resources will be assessed against the requirements set out in Appendix F to Annex A to determine each proposed resource's compliance with the mandatory and rated criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not assess consider a mandatory criteria met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Contractor by e-mail, to allow the Contractor to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. A mandatory criteria will not be considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will a mandatory criteria considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.
- 4 During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contracting Authority may find the quotation to be non-responsive.
- 5 Once the quotation has been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a validly issued TA Form (the Task Authorization) has been received, and any work performed in its absence is done at the Contractor's own risk.

APPENDIX E – Task Authorization Form

| TASK AUTHORIZATION (TA) FORM | | | | |
|--|---|--|---------------------------------|-------------------|
| Contractor: | | Contract Number: | | |
| Commitment: # | | Financial Coding: | | |
| Task Number (Amendment): | | Issue Date: | Response Require By: | |
| 1. Statement of Work (Work Activities, Certifications and Deliverables) | | | | |
| See attached for Statement of Work and Certifications required. | | | | |
| 2. Period of Service: | From (Date) | | To (Date) | |
| 3. Work Location: | | | | |
| 4. Travel Requirements: | | | | |
| 5. Language Requirement: | | | | |
| 6. Other Conditions/Constraints: | | | | |
| 7. Level of Security Clearance required for the Contractor Personnel: | | | | |
| 8. Contractor's Response: | | | | |
| Category and Name of Proposed Resource | PWGSC Security File Number | Firm All- Inclusive Hourly Rate | Estimated # of Days | Total Cost |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Estimated Cost | | | | |
| Applicable Taxes | | | | |
| Total Labour Cost | | | | |
| Total Travel & Living Cost | | | | |

Solicitation No. - N° de l'invitation
EP748-151921/B
Client Ref. No. - N° de réf. du client

Amd. No. - N° de la modif.
File No. - N° du dossier
EP748-151921

Buyer ID - Id de l'acheteur
FQ002
CCC No./N° CCC - FMS No./N° VME

| TASK AUTHORIZATION (TA) FORM | |
|---|--|
| Firm Price or Maximum TA Price | |
| Contractor's Signature | |
| Name, Title and Signature of Individual Authorized to sign on behalf of the Contractor (type or print) _____ | Signature: _____ Date: _____ |
| Approval – Signing Authority | |
| Signatures (Client) Name, Title and Signature of Individual Authorized to sign: Technical Authority: _____ Date: _____ | Signatures (PWGSC) Contracting Authority: _____ Date: _____ |
| You are requested to provide to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out thereof. | |

APPENDIX F - RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE

1.0 To facilitate resource assessment, Contractors must prepare and submit a response to a draft Task Authorization using Mandatory Resource Assessment Criteria provided in this Appendix. When completing the response, the specific information which demonstrates the requested criteria and reference to the page number of the résumé should be incorporated so that the assessor can verify this information. The response should not contain all the project information from the resume. Only the specific answer should be provided.

2.0 Mandatory Resource Assessment Criteria:

The Contractor must substantiate that the proposed resource meets the mandatory requirement listed below for the resource category for which they are being proposed.

2.0.1 For the purpose of this section:

"Public Sector" means municipal, provincial, federal or aboriginal governments.

"Complex": For the purpose of the solicitation evaluation, a Complex project is one that:

- a) Is in one location only (where location refers to one or multiple construction site(s) in a town, city, municipality, county, province, or territory for a distinct design mandate of a standalone project for example a subway system that includes three stations is acceptable although there are multiple construction sites, but construction of multiple retail stores in one city will not be accepted) and includes a minimum of three of the following complexity characteristics:
 - i. Public infrastructure (e.g. subway or tunnel system, airport, bridge, etc.);
 - ii. Constrained spatial environment (e.g. downtown metropolitan area, limited land mass area, etc.);
 - iii. Security requirement of an entire facility (e.g. courthouse, laboratory level 3 or above, airport, prison, etc.);
 - iv. Layers of circulation or technical programming (e.g. pedestrian impact, public transportation, multiple user groups, separating the public from principle occupant or client/user, etc.); or
 - v. Government or public process (e.g. numerous approval bodies, ministerial or equivalent approval, etc.).

"Construction Estimate" means the cost estimate or construction cost associated to a project or program submitted by the Bidder. For completed projects or programs, Bidders are requested to provide the construction cost in Canadian currency for the year completed. If Construction Estimates are not provided in 2015 Canadian currency values, Canada will escalate the construction cost to 2015 Canadian currency values as identified in the table below. Construction Estimates in currencies other than Canadian currency will be converted to Canadian currency by Canada based on the rate of exchange published by the Bank of Canada at the time of the completion date of the project or program submitted by the Bidder.

2.0.2 Experience

Unless specified otherwise, all work experience must have been obtained within the 180 months prior to and excluding the stipulated month of any request for the Team Leader and Senior positions, and within the 120 months prior to and excluding the stipulated month of any request for all other positions.

2.0.3 Education

Academic certification(s) (e.g. degrees, diplomas etc.) for each proposed resource must have been obtained through a recognized academic institution. Proof of academic certification(s) education must be provided. Such proof can be in the form of a photocopy.

If applicable, the proposed resource(s) must meet the education requirements detailed in this Appendix for the resource category for which they are being proposed. Where the criteria requests the Contractor to provide information about the education of the proposed resource, the individual must have obtained their education from a recognized Canadian university, college or high school. In the event the proposed resource studied at an institution outside Canada, only an equivalency assessment issued by a Canadian academic credentials assessment service* will be accepted.

*The agencies and organizations performing this service are listed on the Web site of the Canadian Information Centre for International Credentials at (<http://www.cicic.ca/2/home.canada>).

2.1 Additional - PMSS Team Leader

- a. A minimum of 120 months of experience working as a project manager in at least one Complex real property project or program with Construction Estimate of at least \$450M;
- b. Experience managing:
 - i. Competing priorities;
 - ii. Conflict resolution; and
 - iii. General team management of a minimum of 15 reports (i.e. employees, not design consultants nor contractors);
- c. A post-secondary education certificate, diploma or degree in at least the field of Engineering, Architecture, Public Administration, Project or Property Management, Construction or Business Administration.

2.2 Additional - Senior Project Manager

- a) A minimum of 120 months of experience working as a project manager in at least two real property projects or programs. Each project must have had a Construction Estimate of over \$60M; and
- b) A post-secondary education certificate, diploma or degree.

2.3 Additional - Senior Mechanical and Commissioning Project Manager

-
- a) A minimum of 120 months of experience working as a project manager in at least two mechanical/commissioning real property projects or programs. Each project must have had a Construction Estimate of over \$60M;
 - b) A minimum of 120 months of experience developing and managing commissioning processes, including performance verification of building components, systems and integrated systems; and
 - c) A post-secondary education certificate, diploma or degree.

2.4 Additional - Intermediate Project Manager

- a) A minimum of 60 months of experience as a project manager in real property projects or programs. Each project must have had a Construction Estimate of at least \$5M; and
- b) A post-secondary education certificate, diploma or degree.

2.5 Additional - Intermediate Technical Project Administrator/ Information Management Specialist

- a) At least 36 months of experience working as a Project Administrator/Information Management Specialist in real property projects or programs. Each project must have had a Construction Estimate of at least \$5M;
- b) Experience in developing frameworks for records keeping, information management and project administration; and
- c) A post-secondary education certificate, diploma or degree.

2.6 Additional - Senior Technical Writer

- a) A minimum of 84 months of experience working as a technical writer for real property projects or programs preparing technical reports and presentations;
- b) A minimum of 84 months of experience, conducting research, analysis, and synthesizing technical information into clearly understandable documentation; and
- c) A post-secondary education certificate, diploma or degree.

2.7 Additional - Intermediate Technical Writer

- a) A minimum of 60 months of experience, as a technical writer for real property projects or programs preparing technical content for presentations, reports (e.g. weekly, monthly, quarterly), briefing material, statements of work, work breakdown structures, evaluation material and progress status reports;
- b) A minimum of 60 months of experience conducting research, analysis, and synthesizing technical information into clearly understandable documentation; and
- c) A post-secondary education certificate, diploma or degree.

2.8 Additional - Senior Art Handling Specialist

- a) A minimum of 60 months of experience in planning, implementing and managing the handling, storage and transportation of a varied collection of art and artifacts, with cultural, historic and monetary value;
- b) A minimum of 60 months of experience with diverse art and artifacts ranging in various sizes, weights, and material construction; and
- c) A post-secondary education certificate, diploma or degree.

2.9 Optional – Senior Heritage Conservation Specialist

- a. A minimum of ten years of experience within the last 15 years in the care and preservation of art, artifacts and related heritage materials;
- b. A minimum of ten years of experience within the last 15 years in planning, implementing and managing complex conservation or collection management projects involving multiple personnel;
- c. Managed a minimum of three heritage moves, coordinating logistics, packing and crating approaches for artefacts; and
- d. A post-secondary education certificate, diploma or degree.

2.10 Optional – Intermediate Heritage Conservation Specialist

- a. A minimum of five years of experience within the last seven years in the care and preservation of art, artifacts and related heritage materials;
- b. A minimum of five years of experience within the last seven years in planning, implementing and managing complex conservation or collection management projects involving multiple personnel;
- c. Managed a minimum of two heritage moves, coordinating logistics, packing and crating approaches for artefacts; and
- d. A post-secondary education certificate, diploma or degree.

2.11 Optional – Senior Site Inspector

- a. A post-secondary degree or diploma or construction trade certification;
- b. A minimum of ten years' experience within the last 15 years problem solving construction site issues with consultants, contractors, and owner representatives;
- c. Experience writing site reports; and
- d. Experience providing quality assurance.

2.12 Optional – Intermediate Expenditure Management Administrator

- a. A minimum of five years' experience within the last seven years working as an Intermediate Expenditure Management Administrator, or equivalent function, on real property projects or programs of a minimum value of \$50M.
- b. A post-secondary education certificate, diploma or degree

2.13 Optional – Senior Interior Designer

- a. A post-secondary degree or diploma in the interior design field or architecture; and
- b. A minimum of ten years' experience within the last 15 years working on a combination of all aspects of interior fit-up including:
 - i. Space planning;
 - ii. Gap analysis;
 - iii. Material and finishes selection;
 - iv. Furniture design; and
 - v. Building components (e.g. pre-manufactured furniture systems, office furnishings, etc.).

2.14 Optional – Food Services Specialist

- a. FCSI professional member; and
- b. A minimum of ten years' experience within the last 15 years designing and commissioning food services systems.
- c. A post-secondary education certificate, diploma or degree

2.15 Optional – Senior Financial/ Cost Specialist

- a. A minimum of ten years' experience within the last 15 years working as a financial cost specialist in real property projects;
- b. A minimum of ten years' experience executing Present Value Cost of Accommodation (PVCOA) analysis;
- c. Authored a minimum of three IAR within the past ten years with a minimum value of \$100M within a publicly funded organization; and
- d. Experience in the development of a minimum of three project cost estimates with a minimum value of \$100M on behalf of Public Sector organizations, departments or agencies for real property projects (e.g. delivering office accommodation fit-up and base building solutions etc.).
- e. A post-secondary education certificate, diploma or degree

APPENDIX G - CERTIFICATIONS AT THE TA STAGE

The following Certifications are to be used, as applicable. If they apply, they must be signed and attached to the Contractor's quotation when it is submitted to Canada.

1. EDUCATION AND EXPERIENCE

The Contractor certifies that all the information provided in the résumés and supporting material proposed for completing the subject work, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Contractor to be true and accurate. Furthermore, the Contractor warrants that every individual proposed by the Contractor for the requirement is capable of performing the Work described in the Task Authorization.

Print name of authorized individual & sign above

Date

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

The Contractor certifies that, should it be authorized to provide services under this Task Authorization, the persons proposed in the quotation will be available to commence performance of the work within a reasonable time from the date of issuance of the valid Task Authorization, or within the time specified in the TA Form, and will remain available to perform the work in relation to the fulfillment of the requirement.

Print name of authorized individual & sign above

Date

3. CERTIFICATION OF STATUS OF PERSONNEL

If the Contractor has proposed any individual who is not an employee of the Contractor, the Contractor certifies that it has permission from that individual to propose his/her services in relation to the Work to be performed under this TA and to submit his/her résumé to Canada. At any time during the Contract the Contractor must, upon request from the Contracting Authority, provide the written confirmation, signed by the individual, of the permission that was given to the Contractor of his/her availability. Failure to comply with the request may result in a default under the Contract in accordance with the General Conditions.

Print name of authorized individual & sign above

Date

4. CERTIFICATION OF LANGUAGE - **[English or Bilingual or French]**

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are

[Option 1 - Unilingual English] fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

[Option 2 - Bilingual] fluent in both official languages of Canada (French and English). The individual(s) proposed must be able to communicate orally and in writing in French and English without any assistance and with minimal errors.

Print name of authorized individual & sign above

Date

ANNEX "B"

BASIS OF PAYMENT

A- Contract Period (From contract award date to December 31, 2021)

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

A-1 Professional Fees

A-1.1 Resources contracted from the date of Contract award to December 31, 2021 inclusive in accordance with Annex A

| Resource | Name of Resource | Estimated level of Effort (in days) | Firm All-Inclusive Hourly Rate |
|--|------------------|-------------------------------------|--------------------------------|
| Team Leader | | 1150 | |
| Senior Project Manager #1 | | 1150 | |
| Senior Project Manager #2 | | 1150 | |
| Senior Project Manager #3 | | 1100 | |
| Senior Project Manager #4 | | 1100 | |
| Senior Mechanical Commissioning Project Manager #1 | | 575 | |
| Intermediate Project Manager #1 | | 1100 | |
| Intermediate Project Manager #2 | | 1100 | |
| Intermediate Technical Project Administrator/ Information Management Specialist #1 | | 1150 | |
| Intermediate Technical Project Administrator/ Information Management Specialist #2 | | 1150 | |

| Resource | Name of Resource | Estimated level of Effort (in days) | Firm All-Inclusive Hourly Rate |
|--------------------------------|------------------|-------------------------------------|--------------------------------|
| Senior Technical Writer | | 575 | |
| Intermediate Technical Writer | | 1102 | |
| Senior Art Handling Specialist | | 1102 | |

For the purpose of this Contract, a day is defined as 7.5 hours of work

A-1.2 Applicable rates for additional and optional resources as and when requested through task authorizations

| Resource Category | Firm All-Inclusive Hourly Rate |
|--|--------------------------------|
| Additional - Team Leader | |
| Additional - Senior Project Manager | |
| Additional - Senior Mechanical Commissioning Project Manager | |
| Additional - Intermediate Project Manager | |
| Additional - Intermediate Technical Project Administrator/ Information Management Specialist | |
| Additional - Senior Technical Writer | |
| Additional - Intermediate Technical Writer | |
| Additional - Senior Art Handling Specialist | |
| Optional - Professional Photographer | |
| Optional - Senior Heritage Conservation Specialist | |
| Optional - Intermediate Heritage Conservation Specialist | |

| Resource Category | Firm All-Inclusive Hourly Rate |
|--|--------------------------------|
| Optional - Senior Site Inspector | |
| Optional - Intermediate Expenditure Management Administrator | |
| Optional - Senior Designer | |
| Optional - Food Services Specialist | |
| Optional - Senior Financial / Cost Specialist | |

B- Option Periods

B-1 Option to Extend the Term of the Contract – Option Period 1 (January 1, 2022 to December 31, 2025)

This section is only applicable if option 1 to extend the term of the Contract is exercised by Canada. The rates will be established based on the hourly rates specified in section A-1 of Annex B and will be adjusted in accordance with section C of Annex B Economic Price Adjustment.

During option period 1 of the Contract, the Contractor will be paid as specified above for Work performed in accordance with the Contract.

B-2 Option to Extend the Term of the Contract – Option Period 2 (January 2026 to December 31, 2029)

This section is only applicable if option 2 to extend the term of the Contract is exercised by Canada. The rates will be established based on the hourly rates specified in section A-1 of Annex B and will be adjusted in accordance with section C of Annex B Economic Price Adjustment.

During option period 2 of the Contract, the Contractor will be paid as specified above for Work performed in accordance with the Contract.

B-3 Option to Extend the Term of the Contract – Option Period 3 (January 1, 2030 to December 31, 2030)

This section is only applicable if option 3 to extend the term of the Contract is exercised by Canada. The rates will be established based on the firm all-inclusive hourly rates specified in section A-1 of Annex B and will be adjusted in accordance with section C of Annex B Economic Price Adjustment.

During the option period 3 of the Contract, the Contractor will be paid as specified above for Work performed in accordance with the Contract.

B-4 Option to Extend the Term of the Contract – Option Period 4 (January 1, 2031 to December 31, 2031)

This section is only applicable if option 4 to extend the term of the Contract is exercised by Canada. The rates will be established based on the firm all-inclusive hourly rates specified in section A-1 of Annex B and will be adjusted in accordance with section C of Annex B Economic Price Adjustment.

During option period 4 of the Contract, the Contractor will be paid as specified above for Work performed in accordance with the Contract.

B-5 Option to Extend the Term of the Contract – Option Period 5 (January 1, 2032 to December 31, 2032)

This section is only applicable if option 5 to extend the term of the Contract is exercised by Canada. The rates will be established based on the firm all-inclusive hourly rates specified in section A-1 of Annex B and will be adjusted in accordance with section C of Annex B Economic Price Adjustment.

During option period 5 of the Contract, the Contractor will be paid as specified above for Work performed in accordance with the Contract.

B-6 Option to Extend the Term of the Contract – Option Period 6 (January 1, 2033 to December 31, 2033)

This section is only applicable if option period 6 to extend the term of the Contract is exercised by Canada. The rates will be established based on the firm all-inclusive hourly rates specified in section A-1 of Annex B and will be adjusted in accordance with section C of Annex B Economic Price Adjustment.

During option period 6 of the Contract, the Contractor will be paid as specified above for Work performed in accordance with the Contract.

C- Economic Price Adjustment (EPA)

- C-1** The firm all-inclusive hourly rates indicated in Annex "B" Basis of Payment will be subject to an annual upward or downward EPA as detailed below:

The initial EPA will be effective January 1, 2018 and all subsequent price adjustments will come into effect January 1 of every respective Contract year and thereafter apply to the services provided for the period from January 1 to December 31 of that Contract year.

An adjustment to the firm all-inclusive hourly rates will be based upon the procedures and formula specified below:

- a) Initial EPA: the firm all-inclusive hourly rates adjustments effective on January 1, 2018 will be equal to the applicable Consumer Price Index (CPI) Ottawa-Gatineau for 2017 divided by applicable CPI Ottawa-Gatineau for the month of bid closing.
- b) Subsequent EPA:
The EPA effective on January 1, 2019 and for any subsequent Contract years (including option periods, if exercised) will be equal to the applicable CPI Ottawa-Gatineau for the previous calendar year divided by the applicable CPI Ottawa-Gatineau for the penultimate calendar year. For example, the EPA effective on January 1, 2019 will be equal to the applicable CPI Ottawa-Gatineau for the calendar year 2018 divided by the applicable CPI Ottawa-Gatineau for the calendar year 2017.

$$R_C = \left(\frac{CPI_B}{CPI_A} \times R_B \right)$$

where:

R_C = Total EPA factor applied to correct the firm all-inclusive hourly rates for the services provided between the period of January to December of any specific year of the Contract

R_B = Firm all-inclusive hourly rates applicable for the calendar year preceding the calendar year for which EPA is being calculated.

CPI_A = For the initial EPA, the actual CPI (Table 326-0020 Ottawa-Gatineau, 2002-100) published by Statistics Canada, for the month of bid closing; or

For subsequent EPAs, the actual annual average of the CPI (Table 326-0021 Ottawa-Gatineau, 2002-100) published by Statistics Canada, for the penultimate calendar year for which R_C is being calculated. Annual average indexes are obtained by averaging the indexes for the 12 months of the calendar year.

CPI_B = The actual CPI (Table 326-0021 Ottawa-Gatineau, 2002-100) published by Statistics Canada, for the calendar year preceding the period for which R_C is being calculated. Annual average indexes are obtained by averaging the indexes for the 12 months of the calendar year.

Example of calculation for January 1 to December 31, 2020 hourly rate (R_C) :

R_B = Hourly rate 2019 = \$111.25

CPI_A = CPI 2018 = 132.1

CPI_B = CPI 2019 = 134.3

$$R_C = \left(\frac{134.3}{132.1} \times \$111.25 \right) = \$113.10$$

-
- C-2** In the event of the discontinuance or suspension of the index by Statistics Canada, the Parties must agree upon an appropriate substitute for the discontinued or altered index for use under this clause and amend the Contract accordingly.
- C-3** All EPA calculations must be carried out to two decimal places with the third decimal being rounded up if third decimal is equal to or greater than 5 and rounded down if third decimal is less than or equal to 4.
- C-4** In the event that the applicable CPI is not available at the time of the invoice, a retroactive adjustment without interest will be applied on the first monthly invoice submitted after the publication of the applicable CPI


Solicitation No. - N° de l'invitation
EP748-151921/B
Client Ref. No. - N° de réf. du client

Amnd. No. - N° de la modif.
File No. - N° du dossier
EP748-151921

Buyer ID - Id de l'acheteur
FQ002
CCC No./N° CCC - FMS No./N° VME

ANNEX "C"

SECURITY REQUIREMENTS CHECK LIST

|  | Government of Canada / Gouvernement du Canada | Contract Number / Numéro du contrat EP748-15-1921 R1 | (REV 062) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---|---|-----------|-------------------------|--|-------------------------|--|---|---|---|-----------------|-------------------------|---|---|---|---|---|---|--------------------------|-------------------|--------------------------|--------------|-------------|--------------|--------------------------|-------------|--------------------------|--------|-------------------|--------|-------------------------------------|--------------------|--------------------------|------------|--|------------|--------------------------|--|--------------------------|-------------|--|-------------|--------------------------|--|--------------------------|---------------------|--|---------------------|--------------------------|--|--------------------------|----------------------|--|----------------------|
| Security Classification / Classification de sécurité UNCLASSIFIED | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| SECURITY REQUIREMENTS CHECK LIST (SRCL) LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Public Works and Government Services Canada | | 2. Branch or Directorate / Direction générale ou Directions PWS | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3. a) Subcontract Number / Numéro du contrat de sous-traitance | | 3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4. Brief Description of Work / Brève description du travail Centre Block-Project Management Support Services | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6. Indicate the type of access required / Indiquer le type d'accès requis | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| (Specify the level of access using the chart in Question 7. c) / (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6. b) Will the supplier and its employees (e.g., cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6. c) Is this a commercial courier or delivery requirement with no overnight storage? / S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"><thead><tr><th>Canada</th><th>NATO / OTAN</th><th>Foreign / Étranger</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr></tbody></table> | | | | Canada | NATO / OTAN | Foreign / Étranger | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Canada | NATO / OTAN | Foreign / Étranger | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 7. b) Release restrictions / Restrictions relatives à la diffusion | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"><thead><tr><th>Canada</th><th>NATO / OTAN</th><th>Foreign / Étranger</th></tr></thead><tbody><tr><td>No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/></td><td>All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/></td><td>No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/></td></tr><tr><td>Not releasable / À ne pas diffuser <input type="checkbox"/></td><td></td><td></td></tr><tr><td>Restricted to: / Limité à: <input type="checkbox"/></td><td>Restricted to: / Limité à: <input type="checkbox"/></td><td>Restricted to: / Limité à: <input type="checkbox"/></td></tr><tr><td>Specify country(ies) / Préciser le(s) pays:</td><td>Specify country(ies) / Préciser le(s) pays:</td><td>Specify country(ies) / Préciser le(s) pays:</td></tr></tbody></table> | | | | Canada | NATO / OTAN | Foreign / Étranger | No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/> | All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/> | No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/> | Not releasable / À ne pas diffuser <input type="checkbox"/> | | | Restricted to: / Limité à: <input type="checkbox"/> | Restricted to: / Limité à: <input type="checkbox"/> | Restricted to: / Limité à: <input type="checkbox"/> | Specify country(ies) / Préciser le(s) pays: | Specify country(ies) / Préciser le(s) pays: | Specify country(ies) / Préciser le(s) pays: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Canada | NATO / OTAN | Foreign / Étranger | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/> | All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/> | No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Not releasable / À ne pas diffuser <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Restricted to: / Limité à: <input type="checkbox"/> | Restricted to: / Limité à: <input type="checkbox"/> | Restricted to: / Limité à: <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Specify country(ies) / Préciser le(s) pays: | Specify country(ies) / Préciser le(s) pays: | Specify country(ies) / Préciser le(s) pays: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 7. c) Level of information / Niveau d'information | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"><thead><tr><th>PROTECTED A / PROTÉGÉ A</th><th>NATO UNCLASSIFIED / NATO NON CLASSIFIÉ</th><th>PROTECTED A / PROTÉGÉ A</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr><tr><td>PROTECTED B / PROTÉGÉ B</td><td>NATO RESTRICTED</td><td>PROTECTED B / PROTÉGÉ B</td></tr><tr><td><input type="checkbox"/></td><td>NATO DIFFUSION RESTREINTE</td><td><input type="checkbox"/></td></tr><tr><td>PROTECTED C / PROTÉGÉ C</td><td>NATO CONFIDENTIAL</td><td>PROTECTED C / PROTÉGÉ C</td></tr><tr><td><input type="checkbox"/></td><td>NATO CONFIDENTIAL</td><td><input type="checkbox"/></td></tr><tr><td>CONFIDENTIAL</td><td>NATO SECRET</td><td>CONFIDENTIAL</td></tr><tr><td><input type="checkbox"/></td><td>NATO SECRET</td><td><input type="checkbox"/></td></tr><tr><td>SECRET</td><td>COSMIC TOP SECRET</td><td>SECRET</td></tr><tr><td><input checked="" type="checkbox"/></td><td>COSMIC TRÈS SECRET</td><td><input type="checkbox"/></td></tr><tr><td>TOP SECRET</td><td></td><td>TOP SECRET</td></tr><tr><td><input type="checkbox"/></td><td></td><td><input type="checkbox"/></td></tr><tr><td>TRÈS SECRET</td><td></td><td>TRÈS SECRET</td></tr><tr><td><input type="checkbox"/></td><td></td><td><input type="checkbox"/></td></tr><tr><td>TOP SECRET (SIGINT)</td><td></td><td>TOP SECRET (SIGINT)</td></tr><tr><td><input type="checkbox"/></td><td></td><td><input type="checkbox"/></td></tr><tr><td>TRÈS SECRET (SIGINT)</td><td></td><td>TRÈS SECRET (SIGINT)</td></tr></tbody></table> | | | | PROTECTED A / PROTÉGÉ A | NATO UNCLASSIFIED / NATO NON CLASSIFIÉ | PROTECTED A / PROTÉGÉ A | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | PROTECTED B / PROTÉGÉ B | NATO RESTRICTED | PROTECTED B / PROTÉGÉ B | <input type="checkbox"/> | NATO DIFFUSION RESTREINTE | <input type="checkbox"/> | PROTECTED C / PROTÉGÉ C | NATO CONFIDENTIAL | PROTECTED C / PROTÉGÉ C | <input type="checkbox"/> | NATO CONFIDENTIAL | <input type="checkbox"/> | CONFIDENTIAL | NATO SECRET | CONFIDENTIAL | <input type="checkbox"/> | NATO SECRET | <input type="checkbox"/> | SECRET | COSMIC TOP SECRET | SECRET | <input checked="" type="checkbox"/> | COSMIC TRÈS SECRET | <input type="checkbox"/> | TOP SECRET | | TOP SECRET | <input type="checkbox"/> | | <input type="checkbox"/> | TRÈS SECRET | | TRÈS SECRET | <input type="checkbox"/> | | <input type="checkbox"/> | TOP SECRET (SIGINT) | | TOP SECRET (SIGINT) | <input type="checkbox"/> | | <input type="checkbox"/> | TRÈS SECRET (SIGINT) | | TRÈS SECRET (SIGINT) |
| PROTECTED A / PROTÉGÉ A | NATO UNCLASSIFIED / NATO NON CLASSIFIÉ | PROTECTED A / PROTÉGÉ A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PROTECTED B / PROTÉGÉ B | NATO RESTRICTED | PROTECTED B / PROTÉGÉ B | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | NATO DIFFUSION RESTREINTE | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PROTECTED C / PROTÉGÉ C | NATO CONFIDENTIAL | PROTECTED C / PROTÉGÉ C | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | NATO CONFIDENTIAL | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CONFIDENTIAL | NATO SECRET | CONFIDENTIAL | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | NATO SECRET | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| SECRET | COSMIC TOP SECRET | SECRET | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> | COSMIC TRÈS SECRET | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TOP SECRET | | TOP SECRET | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TRÈS SECRET | | TRÈS SECRET | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TOP SECRET (SIGINT) | | TOP SECRET (SIGINT) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TRÈS SECRET (SIGINT) | | TRÈS SECRET (SIGINT) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

TBS/SCT 350-103(2004/12)


Security Classification / Classification de sécurité
UNCLASSIFIED

Canada

Solicitation No. - N° de l'invitation
EP748-151921/B
Client Ref. No. - N° de réf. du client

Amnd. No. - N° de la modif.
File No. - N° du dossier
EP748-151921

Buyer ID - Id de l'acheteur
FQ002
CCC No./N° CCC - FMS No./N° VME

| | | | |
|---|--|---|-----------|
|  | Government of Canada Gouvernement du Canada | Contract Number / Numéro du contrat EP748-15-1921 R1 Security Classification / Classification de sécurité UNCLASSIFIED | (Rev 002) |
|---|--|---|-----------|

| | | | |
|--|---|--|--|
| PART A (continued) / PARTIE A (suite) | | | |
| 8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets? Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? If Yes, indicate the level of sensitivity. Dans l'affirmative, indiquer le niveau de sensibilité : | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | | |
| 9. Will the supplier require access to extremely sensitive INFOSEC information or assets? Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | | |
| Short Title(s) of material / Titre(s) abrégé(s) du matériel : Document Number / Numéro du document : | | | |
| PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR) | | | |
| 10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis | | | |
| <input type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ | <input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL | <input checked="" type="checkbox"/> SECRET SECRET | <input type="checkbox"/> TOP SECRET TRÈS SECRET |
| <input type="checkbox"/> TOP SECRET - SIGHT TRÈS SECRET - SIGHT | <input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET |
| <input checked="" type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS | Secret clearance only for personnel as per security classification guide. All others at Site Access | | |
| Special comments: Commentaires spéciaux : | | | |
| NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided. REMARQUE: Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni. | | | |
| 10. b) May unscreened personnel be used for portions of the work? Ou personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? If Yes, will unscreened personnel be escorted? Dans l'affirmative, le personnel en question sera-t-il escorté? | | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | <input type="checkbox"/> Yes <input type="checkbox"/> Out |
| PART C - INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS | | | |
| 11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises? Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? | | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | <input type="checkbox"/> Yes <input type="checkbox"/> Out |
| 11. b) Will the supplier be required to safeguard COMSEC information or assets? Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? | | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | <input type="checkbox"/> Yes <input type="checkbox"/> Out |
| PRODUCTION | | | |
| 11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises? Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? | | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | <input type="checkbox"/> Yes <input type="checkbox"/> Out |
| INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI) | | | |
| 11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data? Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? | | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | <input type="checkbox"/> Yes <input type="checkbox"/> Out |
| 11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency? Existera-t-il un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? | | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | <input type="checkbox"/> Yes <input type="checkbox"/> Out |

TS/SCT 350-103(2004/12)

| |
|--|
| Security Classification / Classification de sécurité UNCLASSIFIED |
|--|

Canada

Solicitation No. - N° de l'invitation
EP748-151921/B
Client Ref. No. - N° de réf. du client

Amnd. No. - N° de la modif.
File No. - N° du dossier
EP748-151921

Buyer ID - Id de l'acheteur
FQ002
CCC No./N° CCC - FMS No./N° VME

| | | |
|---|----------------------|------------------------|
|  | Government of Canada | Gouvernement du Canada |
| Contract Number / Numéro du contrat EP748-15-1921 R1 (Rev 002) | | |
| Security Classification / Classification de sécurité UNCLASSIFIED | | |

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

| Category / Catégorie | PROTECTED / PROTÉGÉE | | | CLASSIFIED / CLASSIFIÉE | | | | NATO | | | | COMSEC | | | |
|-----------------------------|----------------------|---|---|-------------------------|--------|------------|------------|--------------|--------|------------|--------|--------------|--------|------------|--------|
| | A | B | C | CONFIDENTIAL | SECRET | TOP SECRET | RESTRICTED | CONFIDENTIAL | SECRET | TOP SECRET | COMSEC | CONFIDENTIAL | SECRET | TOP SECRET | COMSEC |
| Information / Assets | | | | | | | | | | | | | | | |
| Management / Plans | | | | | | | | | | | | | | | |
| Production | | | | | | | | | | | | | | | |
| IT Media / Support IT | | | | | | | | | | | | | | | |
| IT Link / Lien électronique | | | | | | | | | | | | | | | |

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

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

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

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

TB59CT 350-103(2004/12)

Security Classification / Classification de sécurité
UNCLASSIFIED

Canada

Solicitation No. - N° de l'invitation
EP748-151921/B
Client Ref. No. - N° de réf. du client

Amd. No. - N° de la modif.
File No. - N° du dossier
EP748-151921

Buyer ID - Id de l'acheteur
FQ002
CCC No./N° CCC - FMS No./N° VME

| | | | |
|--|---|---|--|
|  | | Government of Canada / Gouvernement du Canada | |
| Contract Number / Numéro du contrat EP748-15-1921 R1 (REV002) | | | |
| Security Classification / Classification de sécurité UNCLASSIFIED | | | |
| PART D - AUTHORIZATION / PARTIE D - AUTORISATION | | | |
| 13. Organization Project Authority / Charge de projet de l'organisme | | | |
| Name (print) - Nom (en lettres moulées) Poulin, Michael | | Title - Titre Senior Project Manager, Major Crown Project | Signature  |
| Telephone No. - N° de téléphone 819-775-7154 | Facsimile No. - N° de télécopieur 819-775-7433 | E-mail address - Adresse courriel michael.poulin@pwgsc.gc.ca | Date 2018/08/08 |
| 14. Organization Security Authority / Responsable de la sécurité de l'organisme | | | |
| Name (print) - Nom (en lettres moulées) Laville, Patricia | | Title - Titre SO | Signature  |
| Telephone No. - N° de téléphone 819-775-7430 | Facsimile No. - N° de télécopieur 819-775-7340 | E-mail address - Adresse courriel patricia.laville@pwgsc.gc.ca | Date JUN - 8 2016 |
| 15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes? <input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui | | | |
| 16. Procurement Officer / Agent d'approvisionnement | | | |
| Name (print) - Nom (en lettres moulées) | | Title - Titre | Signature |
| Telephone No. - N° de téléphone | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel | Date |
| 17. Contracting Security Authority / Autorité contractuelle en matière de sécurité | | | |
| Name Paul Lepinski | | Signature  | |
| Agent à la Sécurité des contrats / Contract Security Officer Programme de la Sécurité industrielle / Industrial Security Program Paul.Lepinski@pwgsc.gc.ca Telephone : 613 957-1294 | | address - Adresse courriel | Date 10-JUN-2016 |

TBS/SCT 350-103(2504/13)

Security Classification / Classification de sécurité
UNCLASSIFIED

Canada

Centre Block Rehabilitation Project

SECURITY CLASSIFICATION GUIDE

for

Project Management Support Services: EP748-15-1921 (Revised September 12, 2016)

| PMSS Contractor Resources | When clearance is required | Security level |
|---|----------------------------|----------------|
| Team Leader | Contract award | Secret |
| Senior Project Manager #1 | Contract award | Secret |
| Senior Project Manager #2 | Contract award | Site Access |
| Senior Project Manager #3 | Contract award | Site Access |
| Senior Project Manager #4 | Contract award | Site Access |
| Senior Project Manager #5 | Prior to commencing work | Site Access |
| Senior Project Manager #6 | Prior to commencing work | Site Access |
| Senior Project Manager #7 | Prior to commencing work | Site Access |
| Senior Mechanical and Commissioning Project Managers #1 | Contract award | Site Access |
| Senior Mechanical and Commissioning Project Managers #2 | Prior to commencing work | Site Access |
| Intermediate Project Manager #1 | Contract award | Site Access |
| Intermediate Project Manager #2 | Contract award | Site Access |
| Intermediate Project Manager #3 | Prior to commencing work | Site Access |
| Intermediate Project Manager #4 | Prior to commencing work | Site Access |
| Intermediate Technical Project Administrator / Information Management Specialist #1 | Contract award | Site Access |
| Intermediate Technical Project Administrator / Information Management Specialist #2 | Contract award | Site Access |
| Intermediate Technical Project Administrator / Information Management Specialist #3 | Prior to commencing work | Site Access |
| Intermediate Technical Project Administrator / Information Management Specialist #4 | Prior to commencing work | Site Access |
| Senior Technical Writer | Contract award | Site Access |
| Intermediate Technical Writer | Contract award | Site Access |
| Senior Art Handling Specialist #1 | Contract award | Site Access |
| Senior Art Handling Specialist #2 | Prior to commencing work | Site Access |
| Professional Photographer | Prior to commencing work | Site Access |
| Total PMSS Contractor Resources | 23 | |

| PMSS Contractor Additional Resources | When clearance is required | Security level |
|---|----------------------------|----------------|
| Senior Project Manager #8 | Prior to commencing work | Site Access |
| Senior Project Manager #9 | Prior to commencing work | Site Access |
| Senior Project Manager #10 | Prior to commencing work | Site Access |
| Senior Project Manager #11 | Prior to commencing work | Site Access |
| Senior Mechanical and Commissioning Project Managers #3 | Prior to commencing work | Site Access |
| Intermediate Project Manager #5 | Prior to commencing work | Site Access |
| Intermediate Project Manager #6 | Prior to commencing work | Site Access |
| Intermediate Technical Project Administrator / Information Management Specialist #5 | Prior to commencing work | Site Access |
| Intermediate Technical Project Administrator / Information Management Specialist #6 | Prior to commencing work | Site Access |
| Total PMSS Contractor Additional Resources | 9 | |

| PMSS Contractor Optional Resources | When clearance is required | Security level |
|---|----------------------------|----------------|
| Senior Heritage Conservation Specialist | Prior to commencing work | Site Access |
| Intermediate Heritage Conservation Specialist | Prior to commencing work | Site Access |
| Senior Site Inspector | Prior to commencing work | Site Access |
| Intermediate Expenditure Management Administrator | Prior to commencing work | Site Access |
| Senior Interior Designer | Prior to commencing work | Site Access |
| Food Services Specialist | Prior to commencing work | Site Access |
| Senior Financial / Cost Specialist | Prior to commencing work | Site Access |
| Total PMSS Contractor Optional resources | 7 | |

ANNEX "D"

TECHNICAL EVALUATION CRITERIA

1. Experience

The experience of the proposed resources must be demonstrated and be directly related to the required category. The Bidder should provide complete details of its experience and the experience of its proposed resources as to where, timeframe (start to end dates including months and years), and how (through which activities/responsibilities), the stated qualifications/experience were obtained. Experience gained by a proposed resource during formal education will not be considered work experience. All requirements for work experience must be obtained in a legitimate work environment as opposed to an educational setting. Co-op terms are considered work experience provided they are related to the required services. Where the Bidder indicates its experience or the experience of a proposed resource has been obtained on a project whose timeframe overlaps that of another referenced project, the months that overlap will only be counted once toward the experience of the Bidder on one project.

The qualifications and experience of the Bidders and its proposed resource(s) will be assessed against the requirements set out in the Request for Proposal (RFP). The evaluation team may request reference information. If applicable, the proposed resource(s) must meet the minimum experience requirements detailed in the RFP for the category for which they are being proposed.

Unless specified otherwise, all work experience must have been obtained within the 180 months prior to and excluding the stipulated month of bid closing for the Team Leader and Senior positions, and within the 120 months prior to and excluding the stipulated month of bid closing for all other positions.

2. Education

Academic certification(s) (e.g. degrees, diplomas etc.) for each proposed resource must have been obtained through a recognized academic institution. Proof of academic certification(s) education must be provided. Such proof can be in the form of a photocopy.

If applicable, the proposed resource(s) must meet the education requirements detailed in the RFP for the resource category for which they are being proposed. Where the RFP requests the Bidder to provide information about the education of the proposed resource, the individual must have obtained their education from a recognized Canadian university, college or high school. In the event the proposed resource studied at an institution outside Canada, only an equivalency assessment issued by a Canadian academic credentials assessment service* will be accepted.

*The agencies and organizations performing this service are listed on the Web site of the Canadian Information Centre for International Credentials at
(<http://www.cicic.ca/2/home.canada>).

3. Definitions

For the purpose of Annex D, the following definitions apply:

"Complex": For the purpose of the solicitation evaluation, a Complex project is one that:

- a) Is in one location only (where location refers to one or multiple construction site(s) in a town, city, municipality, county, province, or territory for a distinct design mandate of a standalone project, for example a subway system that includes three stations is acceptable although there are multiple construction sites, but construction of multiple retail stores in one city will not be accepted) and includes a minimum of three of the following complexity characteristics:
- i. Public infrastructure (e.g. subway or tunnel system, airport, bridge, etc.);
 - ii. Constrained spatial environment (e.g. downtown metropolitan area, limited land mass area, etc.);
 - iii. Security requirement of an entire facility (e.g. courthouse, laboratory level 3 or above, airport, prison, etc.);
 - iv. Layers of circulation or technical programming (e.g. pedestrian impact, public transportation, multiple user groups, separating the public from principle occupant or client/user, etc.); or
 - v. Public sector process (e.g. numerous approval bodies, ministerial or equivalent approval, etc.).

"Construction Estimate" means the cost estimate or construction cost associated to a project or program submitted by the Bidder. For completed projects or programs, Bidders are requested to provide the construction cost in Canadian currency for the year completed. If Construction Estimates are not provided in 2015 Canadian currency values, Canada will escalate the construction cost to 2015 Canadian currency values as identified in the table below. Construction Estimates in currencies other than Canadian currency will be converted to Canadian currency by Canada based on the rate of exchange published by the Bank of Canada at the time of the completion date of the project or program submitted by the Bidder.

Escalation Calculation - 2014 Value of Construction Costs after 1999

Non-Residential Building Construction Price Index (NRBCPI) escalation for Ottawa

* Example: Assumes project completion in December 1999

| Year Count | Year | Example* Construction Cost | StatsCan Escalation Values % | Annual Escalation | Cumulative Escalated Value | Cumulative Escalation |
|------------|------|----------------------------|------------------------------|-------------------|----------------------------|-----------------------|
| 1 | 1999 | \$ 142,500,000 | 2.27 | | | |
| 2 | 2000 | | 8.33 | \$ 11,870,250 | 154,370,250 | 8.33% |
| 3 | 2001 | | 0.72 | \$ 1,111,466 | \$ 155,481,716 | 9.11% |
| 4 | 2002 | | 3.16 | \$ 4,913,222 | \$ 160,394,938 | 12.56% |
| 5 | 2003 | | 3.06 | \$ 4,908,085 | \$ 165,303,023 | 16.00% |
| 6 | 2004 | | 7.09 | \$ 11,719,984 | \$ 177,023,007 | 24.23% |
| 7 | 2005 | | 3.85 | \$ 6,815,386 | \$ 183,838,393 | 29.01% |
| 8 | 2006 | | 6.37 | \$ 11,710,506 | \$ 195,548,899 | 37.23% |
| 9 | 2007 | | 5.59 | \$ 10,931,183 | \$ 206,480,082 | 44.90% |
| 10 | 2008 | | 8.74 | \$ 18,046,359 | \$ 224,526,442 | 57.56% |
| 11 | 2009 | | -1.48 | -\$ 3,322,991 | \$ 221,203,450 | 55.23% |
| 12 | 2010 | | 4.65 | \$ 10,285,960 | \$ 231,489,411 | 62.45% |
| 13 | 2011 | | 5.4 | \$ 12,500,428 | \$ 243,989,839 | 71.22% |
| 14 | 2012 | | 1.43 | \$ 3,489,055 | \$ 247,478,894 | 73.67% |
| 15 | 2013 | | -0.51 | -\$ 1,262,142 | \$ 246,216,751 | 72.78% |
| 16 | 2014 | | 1.54 | \$ 3,791,738 | \$ 250,008,489 | 75.44% |

Non-Residential Building Construction Price Index (NRBCPI) escalation for Ottawa

* Example: Assumes project completion in December 1999

4. Mandatory Technical Criteria

The Bidder must meet the mandatory technical (MT) criteria specified below. The Bidder must provide the necessary documentation to support compliance with these requirements. A Bidder who fails to meet all the mandatory technical criteria will be declared non-responsive and their proposal given no further consideration. Each mandatory technical criteria should be addressed separately.

The Bidder must submit complete the cross reference column in the Compliance Checklist as included in Appendix A to this Annex to include Cross reference(s) to the section(s), page number(s) and paragraph number(s) in the Bidder's proposal must be provided for each criteria. The columns met and not met in the table will be completed by the evaluators to evaluate bids.

4.1. Bidder's Evaluation

4.1.1. Proposed Resources (MT1)

4.1.1.1. Resource Category (MT1.1)

The Bidder must propose the specified number of resources in each of the following required categories **only**. Any individual resource may be proposed for no more than one resource category.

- a) PMSS Team Leader (1);
- b) Senior Project Manager (4);
- c) Senior Mechanical and Commissioning Project Manager (1)
- d) Intermediate Project Manager (2);
- e) Intermediate Technical Project Administrator/Information Management Specialist (2);
- f) Senior Technical Writer (1);
- g) Intermediate Technical Writer (1); and
- h) Senior Art Handling Specialist (1).

4.2. Resource Requirements (MT1.2)

The Bidder must include a table in its proposal, using the table format below, summarizing the following information:

- a) Resource position to be filled;
- b) Name of proposed resource;
- c) Education, including accreditation or certification, of proposed resource;
- d) Security information (level of security, CISC file number and expiry date) of proposed resource;
- e) Total number of months of relevant work experience; and
- f) Reference(s) (name, title, telephone number, e-mail), who may be contacted to verify work experience.

| Resource | Name of Resource | Education, accreditation and/or certification | Security level, CISC number, expiry date | Total months of relevant work experience | Reference(s) |
|---|------------------|---|--|--|--------------|
| PMSS Team Leader | | | | | |
| Senior Project Manager #1 | | | | | |
| Senior Project Manager #2 | | | | | |
| Senior Project Manager #3 | | | | | |
| Senior Project Manager #4 | | | | | |
| Senior Mechanical and Commissioning Project Manager | | | | | |
| Intermediate Project Manager #1 | | | | | |
| Intermediate Project Manager #2 | | | | | |
| Intermediate Technical Project Administrator/ | | | | | |

| Resource | Name of Resource | Education, accreditation and/or certification | Security level, CISD number, expiry date | Total months of relevant work experience | Reference(s) |
|--|------------------|---|--|--|--------------|
| Information Management Specialist #1 | | | | | |
| Intermediate Technical Project Administrator/ Information Management Specialist #2 | | | | | |
| Senior Technical Writer | | | | | |
| Intermediate Technical Writer | | | | | |
| Senior Art Handling Specialist | | | | | |

4.2.1. Project Experience (MT2)

The Bidder must provide details of at least one, and no more than three, projects it delivered and that involve multi-disciplinary approaches to resolve project management challenges or issues within the last 84 months prior to and excluding stipulated month of the bid closing date, in providing resources for real property projects (e.g. government infrastructure, schools, hospitals, public transportation etc.). At least one project must have included a dedicated PMSS type team of at least 15 resources. The Bidder must substantiate its experience and achievements by providing information as it pertains to MT2 on a **maximum of three pages per project**. If a Bidder submits more than three projects, only the first three projects will be evaluated.

4.3. Resources Evaluation

4.3.1. Proposed Resources (MT3)

The Bidder must substantiate the experience and expertise of each proposed resource to be assigned to this Project by providing the relevant information for each resource category below as it pertains to MT3. This information is to be provided on a summary resume **no longer than 3 pages** for the Team Leader and Senior positions, and **no longer than 2 pages** for all other proposed resources. Samples of previously completed technical editorial work, as required for some resources, are not included in the page limitation.

4.3.1.1. Team Leader (MT3.1)

The Bidder must substantiate that the proposed resource has:

- A minimum of 120 months of experience working as a project manager in at least one Complex real property project or program with Construction Estimate of at least \$450M;
- Experience managing:
 - Competing priorities;
 - Conflict resolution; and
 - General team management of a minimum of 15 reports (i.e. employees, not design consultants nor contractors);

- c) A post-secondary education certificate, diploma or degree in at least the field of Engineering, Architecture, Public Administration, Project or Property Management, Construction or Business Administration.

4.3.1.2. Senior Project Manager (MT3.2, MT3.3, MT3.4, MT3.5)

The Bidder must substantiate that each proposed resource has:

- a) A minimum of 120 months of experience working as a project manager in at least two real property projects or programs. Each project must have had a Construction Estimate of over \$60M; and
- b) A post-secondary education certificate, diploma or degree.
- c) A Project Management Professional (PMP) designation for a minimum of two of these positions.

4.3.1.3. Senior Mechanical and Commissioning Project Manager (MT3.6)

The Bidder must substantiate that the proposed resource has:

- d) A minimum of 120 months of experience working as a project manager in at least two mechanical/commissioning real property projects or programs. Each project must have had a Construction Estimate of over \$60M;
- e) A minimum of 120 months of experience developing and managing commissioning processes, including performance verification of building components, systems and integrated systems; and
- f) A post-secondary education certificate, diploma or degree.

4.3.1.4. Intermediate Project Manager (MT3.7, MT3.8)

The Bidder must substantiate that each proposed resource has:

- a) A minimum of 60 months of experience as a project manager in real property projects or programs. Each project must have had a Construction Estimate of at least \$5M; and
- b) A post-secondary education certificate, diploma or degree.

4.3.1.5. Intermediate Technical Project Administrator/Information Management Specialist (MT3.9, MT3.10)

The Bidder must substantiate that each proposed resource has:

- a) At least 36 months of experience working as a Project Administrator/Information Management Specialist in real property projects or programs. Each project must have had a Construction Estimate of at least \$5M;
- b) Experience in developing frameworks for records keeping, information management and project administration; and
- c) A post-secondary education certificate, diploma or degree.

4.3.1.6. Senior Technical Writer (MT3.11)

The Bidder must substantiate that the proposed resource has:

- a) A minimum of 84 months of experience working as a technical writer for real property projects or programs preparing technical reports and presentations;
- b) A minimum of 84 months of experience, conducting research, analysis, and synthesizing technical information into clearly understandable documentation; and
- c) A post-secondary education certificate, diploma or degree.

-
- d) The Bidder must submit two samples of previously completed technical editorial work by the proposed resource. Each sample should show the original text along with all editorial changes, and should not exceed three pages in length. The Bidder must also provide contact information for the contracting organization/person for whom the proposed resource prepared each of the two samples so that Canada may verify the information provided in the Bidder's proposal.

4.3.1.7. *Intermediate Technical Writer (MT4312)*

The Bidder must substantiate that the proposed resource has:

- a) A minimum of 60 months of experience, as a technical writer for real property projects or programs preparing technical content for presentations, reports (e.g. weekly, monthly, quarterly), briefing material, statements of work, work breakdown structures, evaluation material and progress status reports;
- b) A minimum of 60 months of experience conducting research, analysis, and synthesizing technical information into clearly understandable documentation; and
- c) A post-secondary education certificate, diploma or degree.
- d) The Bidder must submit two samples of previously completed technical editorial work by the proposed resource. Each sample should show the original text along with all the editorial changes, and should not exceed three pages in length. The Bidder must also provide contact information for the contracting organization/person for whom the proposed resource prepared each of the two samples so that Canada may verify the information provided in the Bidder's proposal.

4.3.1.8. *Senior Art Handling Specialist (MT3.13)*

The Bidder must substantiate that the proposed resource has:

- a) A minimum of 60 months of experience in planning, implementing and managing the handling, storage and transportation of a varied collection of art and artifacts, with cultural, historic and monetary value;
- b) A minimum of 60 months of experience with diverse art and artifacts ranging in various sizes, weights, and material construction; and
- c) A post-secondary education certificate, diploma or degree.

5. Rated Technical Criteria

Bidders who meet all of the mandatory technical criteria will move on to be evaluated and scored on the point rated technical (RT) criteria.

The Bidder should indicate where the information is located (i.e. cross reference page, section and paragraph) in their written proposal using the following table:

| RT No. | Point Rated Technical Criteria | Available Points | Cross Reference |
|------------------------------------|---|------------------|-----------------|
| RT1 | Experience and Achievements | 230 | |
| RT2 | Approach and Methodology | 205 | |
| RT3 | Experience and Expertise | | |
| RT3.1 | Team Leader | 50 | |
| RT3.2 | Senior Project Manager #1 | 35 | |
| RT3.3 | Senior Project Manager #2 | 35 | |
| RT3.4 | Senior Project Manager #3 | 35 | |
| RT3.5 | Senior Project Manager #4 | 35 | |
| RT3.6 | Senior Mechanical and Commissioning Project Manager | 35 | |
| RT3.7 | Intermediate Project Manager #1 | 20 | |
| RT3.8 | Intermediate Project Manager #2 | 20 | |
| | | | |
| RT3.9 | Intermediate Technical Project Administrator/ Information Management Specialist #1 | 20 | |
| RT3.10 | Intermediate Technical Project Administrator/ Information Management Specialist #2 | 20 | |
| RT3.11 | Senior Technical Writer | 35 | |
| RT3.12 | Intermediate Technical Writer | 20 | |
| RT3.13 | Senior Art Handling Specialist | 35 | |
| Experience and Expertise Subtotal: | | 395 | |
| Grand Total: | | 830 | |

5.1. General Basis of Evaluation

Elements of the Bidder's response to each point rated technical criteria will be evaluated on content and quality using the following criteria and scale.

5.1.1. Content of Response

- Completeness – the response provided includes all the information sought, making the necessary links to information provided in the Statement of Work (SOW).; and
- Use of examples – the response provided includes the use of directly related examples.

5.1.2. Quality of Response

- Structure – the arrangement and organization of the material presented, including key themes and objectives with supporting details and evidence (i.e. logical sequence, chronological order, and ability to follow); and
- Clarity and conciseness – the clarity and conciseness of the written response in addressing the question asked.

| RT | Unsatisfactory | Poor | Fair | Very Good | Excellent |
|---------|--|--|--|--|--|
| Content | Response is inadequate or information is not provided | Response is poor with many gaps or missing information, minimally relevant response with major shortfalls, with few or no examples or links to the SOW | Response is fair with some information gaps, uses some related examples and links to the SOW, although some minor inconsistencies | Response is very good with no or minor information gaps, effectively uses directly related examples and links to the SOW, and meets SOW requirements | Response is excellent with no or minor information gaps, includes innovative ideas or methods, effectively uses directly related examples and links to the SOW, exceeds SOW requirements |
| Quality | Quality of the Response is inadequate, i.e. no structure, unclear and/or wordy | Response is poorly structured, making it difficult to follow and understand, leaving the reader with questions. Response lacks clarity and conciseness | Response is reasonably structured in a logical sequence that is somewhat easy to follow. Response is reasonably clear and concise but lacks refinement | Response is well structured in a logical sequence that is mostly easy to follow. Response is clear and concise | Response is convincing and well-structured in a logical sequence and easy to follow. Response is clear and concise |

5.2. Bidder Evaluation

5.2.1. Experience and Achievements on Projects (RT1)

5.2.1.1. Criteria

For the project summaries submitted under Project Experience (MT2), the response of the Bidder will be evaluated for its content and quality and the Bidder should:

- Substantiate the project management services rendered by the Bidder for each project. For projects undertaken as a joint-venture, consortium or in association, clearly specify the other participants, whether or not they are part of the Bidder under this RFP, and a description of the respective involvement and responsibilities of those other participants on the projects submitted by the Bidder under Project Experience (MT2);
- For each project, substantiate how the project management services rendered contributed to the project's success, including quantifiable (e.g. project management, monitoring and reporting, document and records management, etc.) and intangible elements (e.g. active leadership, team motivation, positive work environment, etc.);
- Substantiate whether PMSS type resources worked on the project and if so, identify the type and number of each type of PMSS resource who worked on the project;

5.2.1.2. Evaluation

| RT1 | 0% | 15% | 50% | 75% | 100% | Available Points |
|-----------|---|--|---|--|--|-------------------------------|
| 5.2.1.1a) | No project management services have been substantiated | Poor substantiation of project management services | Fair substantiation of project management services | Very good substantiation of project management services | Excellent substantiation of project management services | 90 (30 points per project) |
| 5.2.1.1b) | Description of how the services rendered (intangible OR quantifiable) contributed to project success not provided or unsatisfactory | Poor description provided of how the services rendered (intangible OR quantifiable) contributed to project success | Fair description provided of how the services rendered (intangible AND quantifiable) contributed to project success | Very good description provided of how the services rendered (intangible AND quantifiable) contributed to project success | Excellent description provided of how the services rendered (intangible AND quantifiable) contributed to project success | 60 (20 points per project) |
| 5.2.1.1c) | No projects included dedicated PMSS type resources | One of the three projects included some dedicated PMSS type resources on the project team | One of the three projects included a project team consisting solely of dedicated PMSS type resources | Two of the three projects included a project team consisting solely of dedicated PMSS type resources | All three projects included a project team consisting solely of dedicated PMSS type resources | 30 (10 points per project) |

| RT1 | 0% | 15% | 50% | 75% | 100% | Available Points |
|-----------|--|---|---|---|---|------------------|
| 5.2.1.1c) | Project submitted by Bidder with the largest number of PMSS type resources included less than 15 PMSS type resources | Project submitted by Bidder with the largest number of PMSS type resources included at least 15 PMSS type resources | Project submitted by Bidder with the largest number of PMSS type resources included at least 20 PMSS type resources | Project submitted by Bidder with the largest number of PMSS type resources included at least 25 PMSS type resources | Project submitted by Bidder with the largest number of PMSS type resources included at least 30 PMSS type resources | 20 |
| 5.2.1.1 | Quality of response is unsatisfactory | Quality of response is poor | Quality of response is fair | Quality of response is very good | Quality of response is excellent | 30 |
| Total: | | | | | | 230 |

5.2.2. Approach and Methodology (RT2)

The Bidder should elaborate, in a **maximum of three pages**, on how they would foster an integrated and seamless implementation strategy of Contract requirements. The response should demonstrate the Bidder's understanding of project management, human resource management, and communications processes and methodologies as applied to this Project.

5.2.2.1. Criteria

For the purpose of RT2, the response of the Bidder will be evaluated for its content and quality and the Bidder should:

- substantiate the project management approach and methodology to be used to meet the Contract requirements (i.e. tasks, responsibilities and deliverables);
- substantiate the human resource management approach and methodology to be used to provide effective leadership, manage the project team, and handle succession planning;
- substantiate the communications management approach and methodology to be used for seamless, effective and efficient Project decision making and transparent information sharing.

5.2.2.2. Evaluation

| RT2 | 0% | 15% | 50% | 75% | 100% | Available Points |
|-----------|--|--|--|---|--|------------------|
| 5.2.2.1a) | Approach and methodology to project management is not provided or unsatisfactory | Poor approach and methodology to project management provided | Fair approach and methodology to project management provided | Very good approach and methodology to project management provided | Excellent approach and methodology to project management | 75 |
| 5.2.2.1b) | Approach and methodology to human resource | Poor approach and methodology to | Fair approach and methodology to | Very good approach and methodology to | Excellent approach and methodology to | 50 |

| RT2 | 0% | 15% | 50% | 75% | 100% | Available Points |
|-----------|--|--|--|---|---|------------------|
| | management, leadership and succession management is not provided or unsatisfactory | human resource management, leadership and succession management provided | human resource management, leadership and succession management provided | human resource management, leadership and succession management provided | human resource management, leadership and succession management provided | |
| 5.2.2.1c) | Approach and methodology to communications management, decision making and transparent information sharing is not provided or unsatisfactory | Poor approach and methodology to communications management, decision making and transparent information sharing provided | Fair approach and methodology to communications management, decision making and transparent information sharing provided | Very good approach and methodology to communications management, decision making and transparent information sharing provided | Excellent approach and methodology to communications management, decision making and transparent information sharing provided | 50 |
| 5.2.2.1 | Quality of response is unsatisfactory | Quality of response is poor | Quality of response is fair | Quality of response is very good | Quality of response is excellent | 30 |
| Total: | | | | | | 205 |

5.3. Resource Evaluation

5.3.1. Experience and Expertise (RT3.1 through 3.13)

5.3.1.1. Criteria

For each résumé submitted for a proposed resource under Proposed Resources (MT3), the Bidder should substantiate the experience and expertise of the proposed resource to be assigned to this Project by providing the information as it pertains to the criterion listed below and as indicated in the resource evaluation table in 5.3.1.2, Evaluation. This information is to be provided on a summary résumé **no longer than 3 pages** for the Team Leader and Senior positions, and **no longer than 2 pages** for all other proposed resources.

The Bidder should note the experience of any proposed resources on projects and programs involving specialist project management expertise, as well as past project management services experience and familiarity with delivering heritage restoration, preservation or rehabilitation projects in accordance with applicable legislation and policies, if any. For the purpose of RT3, the response will be evaluated on content and quality and the resume should include:

- As identified within the evaluation grids listed under section 5.3.1.1 "Evaluation", the experience of the individual in the proposed role, including the use of project/program examples;
- As identified within the evaluation grids listed under section 5.3.1.1 "Evaluation", the dollar value of the projects/programs identified in (a) above;

- c) As identified within the evaluation grids listed under section 5.3.1.1 "Evaluation", the number of projects/programs identified in (a) above that meet the minimum Construction Estimate;
- d) For the Team Leader only, Evaluation, industry or peer recognition, including industry or professional publications, and/or awards for their contribution in the role; and
- e) As identified within the evaluation grids listed under section 5.3.1.1 "Evaluation", the samples of previously completed technical editorial work by a proposed resource submitted the Bidder for mandatory criteria MT4311 and MT3.12 will be evaluated using the following criteria:
- Quality of work;
 - Grammar, spelling and punctuation; and
 - Complexity.

5.3.1.2. Evaluation

| Team Leader | | | | | | |
|-------------|---|---|---|---|--|------------------|
| RT3.1 | 0% | 15% | 50% | 75% | 100% | Available Points |
| 5.3.1.1a) | Bidder has substantiated the proposed resource has 120 months or less of experience working as a project manager in at least one complex real property project or program | Bidder has substantiated the proposed resource has more than 120 months of experience working as a project manager in at least one complex real property project or program | Bidder has substantiated the proposed resource has more than 144 months of experience working as a project manager in at least one complex real property project or program | Bidder has substantiated the proposed resource has more than 168 months of experience working as a project manager in at least one complex real property project or program | Bidder has substantiated the proposed resource has 180 months of experience working as a project manager in more than one complex real property project or program | 20 |
| 5.3.1.1b) | Project or program submitted with the largest Construction Estimate is not substantiated or is equal or less than \$450 million | Project or program submitted with the largest Construction Estimate is greater than \$450 million | Project or program submitted with the largest Construction Estimate is greater than \$550 million | Project or program submitted with the largest Construction Estimate is greater than \$700 million | Project or program submitted with the largest Construction Estimate exceeds \$900 million | 10 |
| 5.3.1.1c) | One or no complex projects or programs submitted has a Construction | Two complex projects or programs submitted have a Construction | Three to four complex projects or programs submitted have a | Five to six complex projects or programs submitted have a | Seven or more complex projects or programs submitted have a | 10 |

| | | | | | | |
|-----------|--|--|---|---|---|----|
| | Estimate equal to or greater than \$450 million over the past 180 months | Estimate equal to or greater than \$450 million over the past 180 months | Construction Estimate equal to or greater than \$450 million over the past 180 months | Construction Estimate equal to or greater than \$450 million over the past 180 months | Construction Estimate equal to or greater than \$450 million over the past 180 months | |
| 5.3.1.1d) | No industry or peer recognition or award | One industry or peer recognition or award | Three industry or peer recognitions or awards | Four industry or peer recognitions or awards | Five industry or peer recognitions or awards | 5 |
| 5.3.1.1 | Quality of response is unsatisfactory | Quality of response is poor | Quality of response is fair | Quality of response is very good | Quality of response is excellent | 5 |
| Total: | | | | | | 50 |

| Senior Project Manager | | | | | | |
|------------------------|--|--|--|--|---|------------------|
| RT3.2 – RT 3.5 | 0% | 15% | 50% | 75% | 100% | Available Points |
| 5.3.1.1a) | Bidder has substantiated the proposed resource has 120 months or less of experience working as a project manager | Bidder has 1 has substantiated the proposed resource has more than 120 months of experience working as a project manager | Bidder has substantiated the proposed resource has more than 144 months of experience working as a project manager | Bidder has substantiated the proposed resource has more than 168 months of experience working as a project manager | Bidder has substantiated the proposed resource has 180 months of experience working as a project manager | 15 |
| 5.3.1.1b) | Project or program submitted with the largest Construction Estimate is not substantiated or is equal or less than \$60 million | Project or program submitted with the largest Construction Estimate is greater than \$60 million | Project or program submitted with the largest Construction Estimate is greater than \$100 million | Project or program submitted with the largest Construction Estimate is greater than \$200 million | Project or program submitted with the largest Construction Estimate exceeds \$500 million | 8 |
| 5.3.1.1c) | Two or less projects or programs submitted have a Construction Estimate equal to or greater than \$60 million | Three projects or programs submitted have a Construction Estimate equal to or greater than \$60 million | Four projects or programs submitted have a Construction Estimate equal to or greater than \$60 million | Five to six projects or programs submitted have a Construction Estimate equal to or greater than \$60 million | Seven or more projects or programs submitted have a Construction Estimate equal to or greater than \$60 million | 8 |

Solicitation No. - N° de l'invitation
EP748-151921/B
Client Ref. No. - N° de réf. du client

Amd. No. - N° de la modif.
File No. - N° du dossier
EP748-151921

Buyer ID - Id de l'acheteur
FQ002
CCC No./N° CCC - FMS No./N° VME

| Senior Project Manager | | | | | | |
|------------------------|---|-----------------------------------|-----------------------------------|--|--|---------------------|
| RT3.2 – RT 3.5 | 0% | 15% | 50% | 75% | 100% | Available Points |
| 5.3.1.1 | Quality of response is unsatisfactory | Quality of response is poor | Quality of response is fair | Quality of response is very good | Quality of response is excellent | 4 |
| Total: | | | | | | 35 |

| Senior Mechanical and Commissioning Project Manager | | | | | | |
|--|--|--|--|--|---|------------------|
| RT3.6 | 0% | 15% | 50% | 75% | 100% | Available Points |
| 5.3.1.1a) | Bidder has substantiated the proposed resource has 120 months or less experience working as a project manager | Bidder has substantiated the proposed resource has more than 120 months of experience working as a project manager | Bidder has substantiated the proposed resource has more than 144 months of experience working as a project manager | Bidder has substantiated the proposed resource has more than 168 months of experience working as a project manager | Bidder has substantiated the proposed resource has 180 months of experience working as a project manager | 15 |
| 5.3.1.1b) | Project or program submitted with the largest Construction Estimate is not substantiated or is equal or less than \$60 million | Project or program submitted with the largest Construction Estimate is greater than \$60 million | Project or program submitted with the largest Construction Estimate is greater than \$100 million | Project or program submitted with the largest Construction Estimate is greater than \$200 million | Project or program submitted with the largest Construction Estimate exceeds \$500 million | 8 |
| 5.3.1.1c) | Two or less projects or programs submitted have a Construction Estimate equal to or greater than \$60 million | Three projects or programs submitted have a Construction Estimate equal to or greater than \$60 million | Four projects or programs submitted have a Construction Estimate equal to or greater than \$60 million | Five to six projects or programs submitted have a Construction Estimate equal to or greater than \$60 million | Seven or more projects or programs submitted have a Construction Estimate equal to or greater than \$60 million | 8 |
| 5.3.1.1 | Quality of response is unsatisfactory | Quality of response is poor | Quality of response is fair | Quality of response is very good | Quality of response is excellent | 4 |
| Total: | | | | | | 35 |

| Intermediate Project Manager | | | | | | |
|-------------------------------------|---|---|---|---|---|---------------------|
| RT3.7 – RT3.8 | 0% | 15% | 50% | 75% | 100% | Available Points |
| 5.3.1.1a) | Bidder has substantiated the proposed resource has 60 months of experience or less working as a project manager | Bidder has substantiated the proposed resource has more than 60 months of experience working as a project manager | Bidder has substantiated the proposed resource has more than 72 months of experience working as a project manager | Bidder has substantiated the proposed resource has 84 months of experience working as a project manager | Bidder has substantiated the proposed resource has more than 84 months of experience working as a project manager | 8 |
| 5.3.1.1b) | Project or program submitted with the largest Construction Estimate is not substantiated or is equal or less than \$5 million | Project or program submitted with the largest Construction Estimate value is greater than \$5 million | Project or program submitted with the largest Construction Estimate value is greater than \$10 million | Project or program submitted with the largest Construction Estimate value is greater than \$15 million | Project or program submitted with the largest Construction Estimate value exceeds \$20 million | 4 |
| 5.3.1.1c) | One or no projects or programs submitted has a Construction Estimate equal to or greater than \$5 million | Two projects or programs submitted have a Construction Estimate greater than \$5 million | Three projects or programs submitted have a Construction Estimate equal to or greater than \$5 million | Four projects or programs submitted have a Construction Estimate equal to or greater than \$5 million | Five or more projects or programs submitted have a Construction Estimate equal to or greater than \$5 million | 4 |
| 5.3.1.1 | Quality of response is inadequate | Quality of response is poor | Quality of response is fair | Quality of response is very good | Quality of response is excellent | 4 |
| Total: | | | | | | 20 |

| Intermediate Technical Project Administrator/ Information Management Specialist | | | | | | |
|--|--|---|---|---|---|------------------|
| RT3.9 – RT3.10 | 0% | 15% | 50% | 75% | 100% | Available Points |
| 5.3.1.1a) | Bidder has substantiated the proposed resource has 36 months of experience or less working as a Project Administrator/ Information Management Specialist | Bidder has substantiated the proposed resource has over 36 months of experience working as a Project Administrator/ Information Management Specialist | Bidder has substantiated the proposed resource has over 48 months of experience working as a Project Administrator/ Information Management Specialist | Bidder has substantiated the proposed resource has over 72 months of experience working as a Project Administrator/ Information Management Specialist | Bidder has substantiated the proposed resource has 84 months, or more of experience working as a Project Administrator/ Information Management Specialist | 12 |
| 5.3.1.1b) | Project or program submitted with the largest Construction Estimate is not substantiated or is equal or less than \$5 million | Project or program submitted with the largest Construction Estimate value is greater than \$5 million | Project or program submitted with the largest Construction Estimate value is greater than \$10 million | Project or program submitted with the largest Construction Estimate value is greater than \$15 million | Project or program submitted with the largest Construction Estimate value exceeds \$20 million | 4 |
| 5.3.1.1 | Quality of response is unsatisfactory | Quality of response is poor | Quality of response is fair | Quality of response is very good | Quality of response is excellent | 4 |
| Total: | | | | | | 20 |

| Senior Technical Writer | | | | | | |
|--------------------------------|--|--|---|---|---|------------------|
| RT3.11 | 0% | 15% | 50% | 75% | 100% | Available Points |
| 5.3.1.1a) | Bidder has substantiated the proposed resource has 84 months or less of experience working as a technical writer | Bidder has substantiated the proposed resource has more than 84 months of experience working as a technical writer | Bidder has substantiated the proposed resource has more than 108 months of experience working as a technical writer | Bidder has substantiated the proposed resource has more than 144 months of experience working as a technical writer | Bidder has substantiated the proposed resource has more than 168 months of experience working as a technical writer | 15 |

| Senior Technical Writer | | | | | | |
|-------------------------|--|--|---|---|---|---------------------------|
| RT3.11 | 0% | 15% | 50% | 75% | 100% | Available Points |
| 5.3.1.1a) | Bidder has substantiated the proposed resource has 84 months of experience or less conducting research, analysis, and synthesizing technical information into clearly understandable documentation | Bidder has substantiated the proposed resource has 96 months of experience conducting research, analysis, and synthesizing technical information into clearly understandable documentation | Bidder has substantiated the proposed resource has 108 months of experience conducting research, analysis, and synthesizing technical information into clearly understandable documentation | Bidder has substantiated the proposed resource has 132 months of experience conducting research, analysis, and synthesizing technical information into clearly understandable documentation | Bidder has substantiated the proposed resource has more than 132 months of experience conducting research, analysis, and synthesizing technical information into clearly understandable documentation | 5 |
| 5.3.1.1 | Quality of response is unsatisfactory | Quality of response is poor | Quality of response is fair | Quality of response is very good | Quality of response is excellent | 5 |
| 5.3.1.1e) | Samples of work are unsatisfactory | Samples of work are poor | Samples of work are fair | Samples of work are very good | Samples of work are excellent | 10 (5 points each sample) |
| Total: | | | | | | 35 |

| Intermediate Technical Writer | | | | | | |
|-------------------------------|--|--|--|--|---|------------------|
| RT3.12 | 0% | 15% | 50% | 75% | 100% | Available Points |
| 5.3.1.1a) | Bidder has substantiated the proposed resource has 60 months of experience or less working as a technical writer | Bidder has substantiated the proposed resource has more than 60 months of experience working as a technical writer | Bidder has substantiated the proposed resource has more than 72 months of experience working as a technical writer | Bidder has substantiated the proposed resource has 84 months of experience working as a technical writer | Bidder has substantiated the proposed resource has more than 84 months of experience working as a technical writer | 6 |
| 5.3.1.1a) | Bidder has substantiated the proposed resource has 60 months of experience or less conducting research, analysis, and synthesizing | Bidder has substantiated the proposed resource has 72 months of experience conducting research, analysis, and synthesizing | Bidder has substantiated the proposed resource has 84 months of experience conducting research, analysis, and synthesizing | Bidder has substantiated the proposed resource has 96 months of experience conducting research, analysis, and synthesizing | Bidder has substantiated the proposed resource has 108 months or more of experience conducting research, analysis, and synthesizing | 4 |

| Intermediate Technical Writer | | | | | | |
|-------------------------------|---|---|---|---|---|--------------------------|
| RT3.12 | 0% | 15% | 50% | 75% | 100% | Available Points |
| | technical information into clearly understandable documentation | technical information into clearly understandable documentation | technical information into clearly understandable documentation preparing technical content | technical information into clearly understandable documentation | technical information into clearly understandable documentation | |
| 5.3.1.1 | Quality of response is unsatisfactory | Quality of response is poor | Quality of response is fair | Quality of response is very good | Quality of response is excellent | 4 |
| 5.3.1.1e) | Samples of work are unsatisfactory | Samples of work are poor | Samples of work are fair | Samples of work are very good | Samples of work are excellent | 6 (3 points each sample) |
| Total: | | | | | | 20 |

| Senior Art Handling Specialist | | | | | | |
|--------------------------------|---|---|--|--|--|------------------|
| RT3.13 | 0% | 15% | 50% | 75% | 100% | Available Points |
| 5.3.1.1a) | Bidder has substantiated that the proposed resource has 60 months of experience or less planning, implementing and managing the handling, storage and transportation of a varied collection of art and artifacts with cultural, historic and monetary value | Bidder has substantiated that the proposed resource has more than 60 months of experience planning, implementing and managing the handling, storage and transportation of a varied collection of art and artifacts with cultural, historic and monetary value | Bidder has substantiated that the proposed resource has more than 72 months of experience planning, implementing and managing the preservation of art and artifacts with cultural, historic and monetary value | Bidder has substantiated that the proposed resource has 84 months of experience planning, implementing and managing the preservation of art and artifacts with cultural, historic and monetary value | Bidder has substantiated that the proposed resource has more than 84 months planning, implementing and managing the preservation of art and artifacts with cultural, historic and monetary value | 15 |
| 5.3.1.1a) | Bidder has substantiated that the proposed | Bidder has substantiated that the proposed | Bidder has substantiated that the proposed | Bidder has substantiated that the proposed | Bidder has substantiated that the proposed | 8 |

| Senior Art Handling Specialist | | | | | | |
|---------------------------------------|--|--|---|---|---|------------------|
| RT3.13 | 0% | 15% | 50% | 75% | 100% | Available Points |
| | resource has 60 months of experience or less working with diverse art and artifacts ranging in various sizes, weights, and material construction | resource has more than 60 months of experience working with diverse art and artifacts ranging in various sizes, weights, and material construction | resource has more than 72 months of experience working with diverse art and artifacts ranging in various sizes, weights, and material | resource has 84 months of experience working with diverse art and artifacts ranging in various sizes, weights, and material | resource has more than 84 months of experience or less working with diverse art and artifacts ranging in various sizes, weights, and material | |
| 5.3.1.1c) | One or no projects or programs submitted substantiate the resource has experience planning a physical relocation of a collection | Two projects or programs submitted substantiate the resource has experience planning a physical relocation of a collection | Three projects or programs submitted substantiate the resource has experience planning a physical relocation of a collection | Four projects or programs submitted substantiate the resource has experience planning a physical relocation of a collection | Five or more projects or programs submitted substantiate the resource has experience planning a physical relocation of a collection | 8 |
| 5.3.1.1 | Quality of response is unsatisfactory | Quality of response is poor | Quality of response is fair | Quality of response is very good | Quality of response is excellent | 4 |
| Total: | | | | | | 35 |

Appendix A – Compliance Checklist

As indicated in Section 4 of Annex D, The Bidder must submit a completed checklist.

| MT No. | Mandatory Technical Criteria | Bid Preparation Instructions | | Cross Reference |
|-----------------------|------------------------------|------------------------------|---------|-----------------|
| | | MET | NOT MET | |
| Bidder Evaluation: | | | | |
| MT1 | Proposed Resources | | | |
| MT1.1 | Resource Category | | | |
| MT1.2 | Resource Requirements | | | |
| MT2 | Project Experience | | | |
| Resources Evaluation: | | | | |
| MT3 | Proposed Resources | | | |
| MT3.1 | PMSS Team Leader | | | |

| MT No. | Mandatory Technical Criteria | Bid Preparation Instructions | | Cross Reference |
|--------|--|------------------------------|---------|-----------------|
| | | MET | NOT MET | |
| MT3.2 | Senior Project Manager #1 | | | |
| MT3.3 | Senior Project Manager #2 | | | |
| MT3.4 | Senior Project Manager #3 | | | |
| MT3.5 | Senior Project Manager #4 | | | |
| MT3.6 | Senior Mechanical and Commissioning Project Manager | | | |
| MT3.7 | Intermediate Project Manager #1 | | | |
| MT3.8 | Intermediate Project Manager #2 | | | |
| MT3.9 | Intermediate Technical Project Administrator/ Information Management Specialist #1 | | | |
| MT3.10 | Intermediate Technical Project Administrator/ Information Management Specialist #2 | | | |
| MT3.11 | Senior Technical Writer | | | |
| MT3.12 | Intermediate Technical Writer | | | |
| MT3.13 | Senior Art Handling Specialist | | | |

ANNEX "E"

PRICING SCHEDULE

1. The Bidder must complete this pricing schedule and include it in its financial bid once completed. As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid its quoted firm all-inclusive hourly rate (in Can \$) for each of the resource categories identified.
2. The volumetric data included in this pricing schedule are provided for bid evaluated price determination purposes only. They are not to be considered as a contractual guarantee. Their inclusion in this pricing schedule does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.
3. Travel to and within National Capital Region. There will be no travel time or travel and living expenses payable for services rendered within National Capital Region (NCR) as defined in the National Capital Act (R.S.C., 1985, c. N-4), available on the Justice Website (<http://laws-lois.justice.gc.ca/eng/acts/N-4/page-9.html#docCont>).
4. Under any resulting contract, Canada will not accept travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy the contractual obligations
5. The estimated level of effort listed in the tables above is not to be interpreted as a commitment on the part of Canada for future business. All tables must be completed in order to be considered compliant.
6. All resources within the same category must be given the same hourly rate (example: the rates of all Senior Project Managers must be the same). In the event of any discrepancy, Canada will enforce the lowest hourly rate within the given category.
7. The hourly rate of an intermediate resource must not be greater than the hourly rate of a senior resource in related categories.
8. No estimated level of effort is required for option periods 5 & 6 as they are extensions in time only (if required).

PMSS Contractor Required Resources

| (A) | (B) | (C) | (D) | (E) | (F) | (G) | Firm All-Inclusive Hourly Rate | Total Cost = (C) + (D) + (E) + (F) + (G) x 7.5 hrs |
|--|---------------------------------|------------------------|---------------------|---------------------|---------------------|---------------------|--------------------------------|--|
| Resource Category | Name(s) of Proposed Resource(s) | LOE Contract (in Days) | LOE Option Period 1 | LOE Option Period 2 | LOE Option Period 3 | LOE Option Period 4 | | |
| Team Leader | | 1150 | 920 | 920 | 230 | 230 | \$ | \$ |
| Senior Project Manager | | 5750 | 6440 | 6440 | 1610 | 1610 | \$ | \$ |
| Senior Mechanical & Commissioning Project Manager | | 920 | 920 | 920 | 230 | 230 | \$ | \$ |
| Intermediate Project Manager | | 2760 | 3680 | 3680 | 920 | 920 | \$ | \$ |
| Intermediate Technical Project Administrator & Information Management Specialist | | 3680 | 3680 | 3680 | 920 | 920 | \$ | \$ |
| Senior Technical Writer | | 460 | 460 | 805 | 230 | 230 | \$ | \$ |
| Intermediate Technical Writer | | 1150 | 920 | 920 | 230 | 230 | \$ | \$ |
| Senior Art Handling Specialist | | 1610 | 1840 | 1840 | 460 | 460 | \$ | \$ |
| Professional Photographer | | 138 | 184 | 184 | 46 | 46 | \$ | \$ |
| Total Estimated Cost (H): | | | | | | | \$ | |

PMSS Contractor Additional resources

| (A) | (B) | (C) | (D) | (E) | (F) | (G) | Firm All-Inclusive Hourly Rate | Total Cost = (C) + (D) + (E) + (F) + (G) x 7.5 hrs |
|---|---------------------------------|------------------------|---------------------|---------------------|---------------------|---------------------|--------------------------------|--|
| Consultant Category | Name(s) of Proposed Resource(s) | LOE Contract (in Days) | LOE Option Period 1 | LOE Option Period 2 | LOE Option Period 3 | LOE Option Period 4 | | |
| Senior Heritage Conservation Specialist | | 345 | 460 | 345 | 0 | 0 | \$ | \$ |
| Intermediate Heritage Conservation Specialist | | 345 | 460 | 345 | 0 | 0 | \$ | \$ |
| Senior Site Inspector | | 690 | 920 | 805 | 115 | 115 | \$ | \$ |
| Intermediate Expenditure Management Administrator | | 690 | 920 | 805 | 115 | 115 | \$ | \$ |
| Senior Designer | | 345 | 460 | 138 | 0 | 0 | \$ | \$ |
| Food Services Specialist | | 230 | 207 | 333 | 46 | 46 | \$ | \$ |
| Senior Financial / Cost Specialist | | 345 | 460 | 460 | 115 | 115 | \$ | \$ |
| Total Estimated Cost (I): | | | | | | | | \$ |

TOTAL BID PRICE FOR EVALUATION (**BIDDER'S EVALUATED PRICE**)
= (H) + (I) \$_____

ANNEX "F" to PART 3 OF THE BID SOLICITATION
ELECTRONIC PAYMENT INSTRUMENTS

The Bidder accepts to be paid by any of the following Electronic Payment Instrument(s):

- ☐ () VISA Acquisition Card;
- ☐ () MasterCard Acquisition Card;
- ☐ () Direct Deposit (Domestic and International);
- ☐ () Electronic Data Interchange (EDI);
- ☐ () Wire Transfer (International Only);
- ☐ () Large Value Transfer System (LVTS) (Over \$25M).

ANNEX "G" to PART 5 OF THE BID SOLICITATION

INTEGRITY DECLARATION FORM

An Integrity Declaration Form must be submitted **only** when:

1. the supplier, one of its affiliates¹ or a proposed first-tier subcontractor² has been charged with or convicted of a criminal offence in a country other than Canada that, to the best of the supplier's knowledge and belief, may be similar to one of the listed offences in the [Ineligibility and Suspension Policy](#) (the "Policy"); and/or
2. the supplier is unable to provide any of the certifications required by the [Integrity Clauses](#).

Instructions for Submitting an Integrity Declaration Form

1. Please complete the Integrity Declaration Form by providing the information requested in the table, below. Put the completed Form in a sealed envelope labeled, "Protected B," and addressed to:

Integrity, Departmental Oversight Branch
Public Works and Government Services Canada
11 Laurier Street, Place du Portage, Phase III, Tower A, 10A1 – room 105
Gatineau (Québec), Canada K1A 0S5

2. Include the sealed envelope with your bid submission, offer or lease.

SECTION 1: SUPPLIER INFORMATION

| | |
|---|--|
| Supplier's legal name: | |
| Supplier's address: | |
| Supplier's procurement business number (PBN): | |
| Lease or solicitation number: | |
| Date of bid, offer submission date or closing date of Invitation to Offer: (YYYY-MM-DD) | |

¹ Please refer to the Policy for the definition of affiliate. An affiliate of a business entity includes persons, such as the senior officers of the business entity, and associated entities such as parent companies and subsidiaries.

² The term "first-tier subcontractor" is defined in section 16(a) of the Policy. A proposed first-tier subcontractor is a first-tier subcontractor that is identified by name in a bid submission, offer, lease, etc. by a supplier in a procurement process or real property transaction.

SECTION 2: FOREIGN CRIMINAL OFFENCES

If applicable, please provide a complete list of all foreign criminal charges and convictions pertaining to yourself, your affiliates and your proposed first-tier subcontractors that, to the best of your knowledge and belief, may be similar to one of the domestic criminal offences listed in the Policy.

If there is more than one potentially similar foreign charge or conviction, please identify all additional charges and convictions, including the information below, in a separate document under the heading Foreign Criminal Offences, to be included with this Form.

| | |
|---|--|
| Name of party with charge or conviction | |
| Relationship of party to supplier | |
| Foreign country and jurisdiction where charge/conviction occurred | |
| Specify whether charge or conviction | |
| Section number and law under which charge/conviction occurred | |
| Date of charge/conviction (YYYY-MM-DD) | |
| Domestic offence that may be similar | |
| Additional Comments: | |

Additional charges/convictions are identified in a separate document included with this Form: **Yes** ☐ **No** ☐

SECTION 3: INABILITY TO PROVIDE A CERTIFICATE

A. INABILITY TO CERTIFY AS TO FOREIGN CRIMINAL CHARGES AND CONVICTIONS

If you are unable to certify that you have provided the required list of all foreign criminal charges and convictions, you must explain why. The explanation should be provided in a separate document under the heading Inability to Certify as to Foreign Criminal Charges and Convictions, to be included with this Form. PWGSC may request additional information from you.

An explanation regarding foreign criminal charges and convictions is provided in a separate document included with this Form: **Yes** ☐ **No** ☐

B. INABILITY TO CERTIFY AS TO DOMESTIC CRIMINAL OFFENCES AND OTHER CIRCUMSTANCES

If a criminal offence or other circumstance described in the Policy applies to you, one of your affiliates or a proposed first-tier subcontractor, you must identify that offence or circumstance, below. By marking a box beside an offence, you are acknowledging that the identified party, be it you, an affiliate or a first-tier subcontractor, has been charged with, convicted of or pleaded guilty to, that offence. In the row titled Comments, you must identify the affected party by name and specify how the particular offence you have identified applies to the named party.

| Offence | Supplier | Affiliate | Subcontractor |
|---|--------------------------|--------------------------|--------------------------|
| <i>Financial Administration Act</i> | | | |
| 80(1)(d): False entry, certificate or return | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 80(2): Fraud against Her Majesty | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 154.01: Fraud against Her Majesty | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <i>Criminal Code</i> | | | |
| 121: Frauds on the government and contractor subscribing to election fund | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 124: Selling or purchasing office | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 380: Fraud – committed against Her Majesty | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 418: Selling defective stores to Her Majesty | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| | | | |
|---|--------------------------|--------------------------|--------------------------|
| <i>Criminal Code</i> | | | |
| 119: Bribery of judicial officers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 120: Bribery of officers | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 346: Extortion | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 367: Punishment for forgery | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 368: Use, trafficking or possession of a forged document | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 382: Fraudulent manipulation of stock exchange transactions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 382.1: Prohibited insider trading | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 397: Falsification of books and documents | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 422: Criminal breach of contract | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 426: Secret commissions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 462.31: Laundering proceeds of crime | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 467.11: Participation in activities of criminal organization | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 467.12: Commission of offence for criminal organization | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 467.13: Instructing commission of offence for criminal organization | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <i>Competition Act</i> | | | |
| 45: Conspiracies, agreements or arrangements between competitors | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 46: Foreign directives | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 47: Bid rigging | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 49: Agreements or arrangements of federal financial institutions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 52: False or misleading representation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 53: Deceptive notice of winning a prize | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <i>Corruption of Foreign Public Officials Act</i> | | | |
| 3: Bribing a foreign public official | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4: Accounting | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5: Offence committed outside Canada | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <i>Controlled Drugs and Substances Act</i> | | | |
| 5: Trafficking in substance | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6: Importing and exporting | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7: Production of substance | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| | | | |
|---|--|--|--|
| Lobbying Act Registration of Lobbyists 5: Consultant Lobbyists 7: In-house Lobbyists (Corporations and Organizations) | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> |
| Income Tax Act 239: False or deceptive statements | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Excise Tax Act 327: False or deceptive statements | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Other Circumstances (Specify): | | | |

Comments:

C. INABILITY TO CERTIFY AS TO A DETERMINATION OF INELIGIBILITY OR SUSPENSION

If you are aware of a determination of ineligibility or suspension with respect to yourself, one of your affiliates or a proposed first-tier subcontractor, you should explain the circumstances of your participation in the competitive process. With respect to an ineligible or suspended subcontractor, then you should include a copy of the written consent to propose the ineligible or suspended subcontractor.

If you are otherwise unable to certify that you are unaware of a determination of ineligibility or suspension with respect to yourself, one of your affiliates or a proposed first-tier subcontractor you must explain why.

All required explanations should be provided in a separate document under the heading Inability to Certify as to a Determination of Ineligibility or Suspension, to be included with this Form. PWGSC may request additional information from the supplier.

An explanation regarding a determination of ineligibility or suspension is provided in a separate document included with this Form: **Yes** ☐ **No** ☐

Declaration

I, (name) _____, (position) _____, of (supplier's name) _____ declare that the information provided in this Form is, to the best of my knowledge and belief, true, accurate and complete. I am aware that a false or misleading certification or declaration will result in my proposal or offer being deemed non-responsive. I am also aware that Canada may terminate a

contract or real property agreement for default when a supplier has provided a false or misleading certification or declaration and, further to the Policy, the supplier will be ineligible for award of a contract or real property agreement for 10 years.

Signature

With Thanks

We appreciate your interest in doing business with the Government of Canada and your understanding of the additional steps that must be taken to protect the integrity of Canada's procurement and real property processes.

Guidance Document for the Declaration Form

This Integrity Declaration Form (the "Form") is for use by bidders in procurement processes and by vendors, purchasers, tenants and lessors in real property transactions. In this Form, the term "supplier" includes bidders, vendors, purchasers, tenants and lessors. The term "party" is used in this Form to include suppliers, affiliates and first-tier subcontractors.

The Integrity Clauses contained in instruments involved in procurement processes and real property transactions (the "Integrity Clauses") require a supplier to submit an Integrity Declaration Form in two circumstances:

1. when the supplier, one of its affiliates³ or a proposed first-tier subcontractor⁴ has been charged with or convicted of a criminal offence in a country other than Canada that, to the best of the supplier's knowledge and belief, may be similar to one of the listed offences in the *Ineligibility and Suspension Policy* (the "Policy"); and
2. when the supplier is unable to provide any of the certifications required by the Integrity Clauses.

An Integrity Declaration Form must be submitted only when one or both of these circumstances apply to the supplier. When no Form is submitted, it will be understood to mean that neither of these two circumstances apply to the supplier.

A supplier that provides a false or misleading certification or declaration will have its proposal or offer deemed non-responsive. Canada may also terminate a contract or real property agreement for default in such circumstances. Moreover, further to the Policy, a supplier will be ineligible for award of a contract or real property agreement for 10 years.

1. Foreign Criminal Offences

The Policy provides, among other things, that a supplier may be ineligible for award of a contract or real property agreement when the supplier or one of its affiliates has been convicted of an offence listed in the Policy or of a similar offence in a foreign jurisdiction.

The Integrity Clauses require a supplier to provide a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first-tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the domestic criminal offences listed in the Policy. The domestic offences listed in the Policy, including their section numbers, are identified in section B of this form, under the heading Inability to Certify as to Domestic Criminal Offences and Other Circumstances. PWGSC determines whether a foreign offence and an offence listed in the Policy are similar. PWGSC may seek additional information from a supplier for purposes of making this determination.

If there is more than one potentially similar foreign charge or conviction, please identify all additional charges and convictions, including all necessary information, in a separate document under the heading Foreign Criminal Offences, to be included with this Form.

~~3 Please refer to the Policy~~ for the definition of affiliate. An affiliate of a business entity includes persons, such as the senior officers of the business entity, and associated entities such as parent companies and subsidiaries.

⁴ The term "first-tier subcontractor" is defined in section 16(a) of the Policy. A proposed first-tier subcontractor is a first-tier subcontractor that is identified by name in a bid submission, offer, lease, etc. by a supplier in a procurement process or real property transaction.

2. Inability to Provide a Certificate

The Integrity Clauses provide that, by submitting a bid or offer, a supplier is certifying to the truth of six statements. Generally speaking, a supplier is certifying that:

1. it has read and understands the Policy, including that it may be declared ineligible to enter into a contract or real property agreement with Canada in certain circumstances;
2. none of those circumstances that will or may result in the supplier being ineligible to enter, or suspended from entering, a contract or real property agreement apply to it; and
3. it has provided a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first-tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the domestic offences listed in the Policy.

When a supplier is unable to provide any of the six certifications required by the Integrity Clauses, it must complete and submit this Form with its bid or offer.

A. Inability to Certify as to Foreign Criminal Charges and Convictions

As noted above, the Integrity Clauses require a supplier to provide a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first-tier subcontractors that, to the best of its knowledge and belief, may be similar to

one of the domestic criminal offences listed in the Policy. The complete list of foreign criminal charges and convictions, if any, must be submitted using this Form. By submitting a bid or offer, a supplier is certifying that it has provided a complete list of all such foreign criminal charges and convictions, if any.

If a supplier is unable to certify that it has provided the required list of all foreign criminal charges and convictions, it must explain why. The explanation should be provided in a separate document under the heading Inability to Certify as to Foreign Criminal Charges and Convictions, to be included with this Form. PWGSC may request additional information from the supplier.

B. Inability to Certify as to Domestic Criminal Offences and Other Circumstances

The Integrity Clauses require a supplier to certify that none of the domestic criminal offences listed in sections 6(a) to (c) of the Policy, as identified in section 3.B of this form, and other circumstances described in the Policy, that will or may result in a determination of ineligibility or suspension, apply to it, one of its affiliates or a proposed first-tier subcontractor. A criminal offence applies to a party where the party has been charged with, convicted of or pleaded guilty to, the offence in the past three years and has not received a pardon for the offence.⁵ Other circumstances identified in the Policy that will or may result in ineligibility or suspension include entering into a first-tier subcontract with an ineligible or suspended supplier [Policy, s. 6(d)], providing a false or misleading certification or declaration [Policy, s. 6(e)] and breaching a term or condition of an Administrative Agreement with PWGSC [Policy, s. 7(c)].

When a criminal offence or other circumstance described in the Policy applies to a supplier, one of its affiliates or a proposed first-tier subcontractor, the supplier must identify that offence or circumstance. By marking a box beside an offence, a supplier is acknowledging that the identified party, be it the supplier, an affiliate or a first-tier subcontractor, has been charged with, convicted of or pleaded guilty to, that offence. In the row titled Comments, the supplier must identify the affected party by name and specify how the particular offence it has identified applies to the named party.

C. Inability to Certify as to a Determination of Ineligibility or Suspension

The Integrity Clauses require a supplier to certify that it is not aware of a determination of ineligibility or suspension issued by PWGSC that applies to it, one of its affiliates or a proposed first-tier subcontractor. The process for determining the status of a party under the Policy is described in section 16(b) of the Policy. When a supplier is unable to provide this certification, it must complete this Form.

Under section 15 of the Policy, titled Public Interest Exception ("PIE"), a contracting authority may enter into a contract or real property agreement with an ineligible or suspended supplier in narrow circumstances if the relevant Deputy Head or equivalent considers that doing so is in the public interest. Subject to receiving a PIE, an ineligible or suspended supplier that participates in a competitive solicitation or real property

transaction will be declared non-responsive [Policy, s. 13(c)]. A supplier seeking a PIE in a competitive process would be unable to certify as to the absence of a determination with respect to itself.

Similarly, under section 16(e) of the Policy, a supplier may seek, in advance, the written consent of the relevant Deputy Head or equivalent to propose an ineligible or suspended first-tier subcontractor in a competitive process. Such request should be made through the named contracting or real property authority. A supplier that

has obtained, in advance, written consent to use an ineligible or suspended first-tier subcontractor would be unable to certify as to the absence of a determination with respect to the subcontractor.

It should be noted, however, that a Deputy Head or equivalent cannot provide consent to contract with a supplier that has lost its capacity to contract with Canada, further to subsection 750(3) of the *Criminal Code*. Similarly, consent cannot be provided for a supplier to enter into a first-tier subcontract with a subcontractor that has lost its capacity to receive any benefit under a contract between Canada and any other person, further to subsection 750(3) of the *Criminal Code*.

When a supplier is aware of a determination of ineligibility or suspension with respect to itself, one of its affiliates or a proposed first-tier subcontractor it should explain the circumstances of its participation in the competitive process. If the supplier is seeking a PIE, it should explain why it is in the public interest to be awarded the contract. With respect to an ineligible or suspended subcontractor, the supplier should include a copy of the written consent to propose the ineligible or suspended subcontractor.

When a supplier is otherwise unable to certify that it is unaware of a determination of ineligibility or suspension with respect to itself, one of its affiliates or a proposed first-tier subcontractor it must explain why.

All required explanations should be provided in a separate document under the heading Inability to Certify as to a Determination of Ineligibility or Suspension, to be included with this Form. PWGSC may request additional information from the supplier.

⁵ See, Policy, section 8, for information on pardons. A pardon would apply only to a conviction.

ANNEX "H" to PART 5 OF THE BID SOLICITATION

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

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

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

Date: _____(YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- ☐ A1. The Bidder certifies having no work force in Canada.
- ☐ A2. The Bidder certifies being a public sector employer.
- ☐ A3. The Bidder certifies being a federally regulated employer being subject to the Employment Equity Act.
- ☐ A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.

A5. The Bidder has a combined workforce in Canada of 100 or more employees; and

- ☐ A5.1. The Bidder certifies already having a valid and current Agreement to Implement Employment Equity (AIEE) in place with ESDC-Labour.

OR

- ☐ A5.2. The Bidder certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- ☐ B1. The Bidder is not a Joint Venture.

OR

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

ANNEX "I" to PART 5 OF THE BID SOLICITATION

INSURANCE REQUIREMENTS

1 Commercial General Liability Insurance

a. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.

b. The Commercial General Liability policy must include the following:

- i. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
- ii. Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
- iii. Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
- iv. Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
- v. Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
- vi. Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
- vii. Employees and, if applicable, Volunteers must be included as Additional Insured.
- viii. Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
- ix. Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- x. Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- xi. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- xii. Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.

1.1 Errors and Omissions Liability Insurance

- i. The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
- ii. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- iii. The following endorsement must be included:
 - a. Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.