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**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

Revision to a Request for a Standing Offer

Révision à une demande d'offre à commandes

National Individual Standing Offer (NISO)

Offre à commandes individuelle nationale (OCIN)

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

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

Comments - Commentaires

This document contains a security requirement.

Ce document contient une condition de sécurité.

Vendor/Firm Name and Address

**Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution

Maintenance & Professional Consulting Services
Division (FK)
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| | | |
|--|--|---|
| Title - Sujet SMART BUILDING SERVICES | | |
| Solicitation No. - N° de l'invitation EN438-170958/A | Date 2016-12-14 | |
| Client Reference No. - N° de référence du client 20170958 | Amendment No. - N° modif. 007 | |
| File No. - N° de dossier fk289.EN438-170958 | CCC No./N° CCC - FMS No./N° VME | |
| GETS Reference No. - N° de référence de SEAG PW-\$\$FK-289-71747 | | |
| Date of Original Request for Standing Offer | | 2016-10-20 |
| Date de la demande de l'offre à commandes originale | | |
| Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2017-01-16 | | Time Zone Fuseau horaire Eastern Standard Time EST |
| Address Enquiries to: - Adresser toutes questions à: Ghoumrassi(fk div), Hakim | | Buyer Id - Id de l'acheteur fk289 |
| Telephone No. - N° de téléphone (873) 469-4910 () | FAX No. - N° de FAX (819) 956-3600 | |
| Delivery Required - Livraison exigée | | |
| Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: | | |
| Security - Sécurité This revision does not change the security requirements of the Offer. Cette révision ne change pas les besoins en matière de sécurité de la présente offre. | | |

Instructions: See Herein

Instructions: Voir aux présentes

| | | |
|--|--------------------------|--------------------------|
| Acknowledgement copy required | Yes - Oui | No - Non |
| Accusé de réception requis | <input type="checkbox"/> | <input type="checkbox"/> |
| The Offeror hereby acknowledges this revision to its Offer. Le proposant constate, par la présente, cette révision à son offre. | | |
| Signature | Date | |
| Name and title of person authorized to sign on behalf of offeror. (type or print) Nom et titre de la personne autorisée à signer au nom du proposant. (taper ou écrire en caractères d'imprimerie) | | |
| For the Minister - Pour le Ministre | | |

This solicitation amendment 007 is issued to 1) answer questions raised from the Industry, 2) provide clarification on R2 of amendment 006 – definition of a bidder, 3) revise Annex A - Statement of Requirement (SoR), 4) revise part 4 of the RFSO, 5) revise annex B – Financial Offer; 6) change the solicitation closing date and 7) change the Standing Offer Authority.

1)

Q1 There is no allowance for travel within the RFP. Currently, Canada is assuming that the contractor will provide a fixed price (per building), plus a rate card for optional services. Within the fixed price evaluation, PSPC has chosen to award a percentage allocation of buildings based on the 1st, 2nd and 3rd place results, and the contractors currently do not have any idea which buildings they will be awarded. This makes it very hard to estimate travel accurately as most contractors are not located in every city. There is no basis within which to estimate travel for the fixed price and the labour rates because the location(s) are unknown. Could Canada please allow for travel to be priced separately at the time of the task authorization, to ensure costs are estimated fairly and transparently across all the contractors?

R1 Please see attached revised Annex B – Financial Offer

Q2 Could the Crown please clarify its response to Q8.2 in Amendment #4. The Crown's response does not address the question, it only addresses the example in the question.

From Amendment 4, Q8.2: Asbestos

As per Canada's response to Q8; In regards to Asbestos, it is apparent by the table supplied by the Crown, that a high percentage of buildings in this RFSO call-up have a presence of Asbestos. The Call-ups associated with varying types of asbestos installs may significantly affect handling and disposal costs, from building to building. Taking this into account, would the Crown consider exclusion of all of the potential costs associated with the handling and disposal of asbestos in this RFSO?

R2 If there is construction work involved, the contractor needs to obtain from a Crown representative the information on where the asbestos and any other hazardous substances are located. A designated substance report or a similar type of report (depending in which Region the building is located) will be made available by a Crown representative to the contractor doing work in a Crown building, as required. This report would cover the area where the contractor will be performing work. Based on the experienced gained from the pilot implementations of Smart Buildings and the amount of work required, it is expected that no asbestos abatement work would be required and that there would be no hazard for the contractor.

If asbestos is in the vicinity of the construction area, alternative installation areas must be explored. If no alternative installation areas are feasible and asbestos abatement is required, the crown, at its discretion, will perform the work or will assume the cost of the work but not before the contractor receives pre-authorization.

2) To provide further clarification on Q2 of amendment 006 – definition of a bidder.

If a bidder wants to bring in the qualification of a separate legal entity such as a parent or affiliate, they have to form a joint venture with that parent or affiliate and bid together. PWGSC cannot evaluate the qualifications of a non-party to the offer.

- 3) Please see attached revised SoR.
- 4) Please see attached revised part 4 of the RFSO.
- 5) Please see attached revised annex B – Financial Offer.
- 6) Change the solicitation closing date from December 21, 2016 to January 16, 2017.
- 7) At 7A.1.1 Standing Offer Authority, delete its entirety and replace with the following:

7A.1.1 Standing Offer Authority

The Standing Offer Authority is:

Hakim Ghoumrassi
Acting Supply Team Leader
Public Works and Government Services Canada
Acquisition Branch
Real Property Contracting Directorate
Place du Portage, Phase III, 3C2
11 Laurier Street
Gatineau, Quebec K1A 0S5
Telephone: 873-469-4910
Facsimile: 819-956-3600
E-mail address: hakim.ghoumrassi@tpsgc-pwgsc.gc.ca

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

No other changes apply.

1 Background

The Government of Canada is evaluating ways to improve its building operations and increase energy efficiency throughout its portfolio of properties by implementing Smart Building technologies.

2 Objective

The Government of Canada seeks an experienced Contractor for the purpose of providing building energy performance analytics, off-site monitoring, **and building occupancy tracking** for multiple buildings owned by Canada in order to realize operational efficiencies, reductions in Greenhouse Gas emissions, and energy savings associated with Smart Building technologies.

3 Scope of Work

The Contractor's solution to Canada must include all the service requirements of this **Statement of Requirement (SoR)**.

All buildings selected for this project currently have Building Automation Systems (BAS) that generate data for use by proposed solutions. Canada will provide the Contractor, at the time of the call-up, information about the target buildings and a list of equipment to be monitored.

Buildings selected for this project may have a system used for collecting building occupancy data. If no system exists in the building at the time of the call up, the collection of building occupancy data will not be required at the time of installation, but may be exercised during the contract.

The Contractor must verify compatibility of the existing BAS with the Contractor's system and, if selected, will provide all necessary means to connect to the existing BAS. Canada does not guarantee or imply compatibility of any of the existing BAS with the Contractor's solution.

Canada will make the building occupancy data available and will provide the required integration with the building's BAS, or directly with the Contractor's solution.

The Contractor must verify availability of adequate power supply in the location where the solution is to be installed and, if necessary, must obtain a cost estimation of installing required power supply and include the cost in the total pricing.

Contractor must provide the expertise to advise Canada on the best solution to capture building occupancy data. This includes determining if existing buildings data can be used for this purpose or recommending a different solution in situations where required data is not available.

The Contractor must contact the relevant local utilities (electricity and natural gas) to determine the availability of conservation program incentives, rebates or grants that are applicable to this project. If such programs are available, the selected Contractor is required to fulfill all program requirements in order to obtain all applicable utility incentives on behalf of the Crown. This includes, but not limited to, providing the local utility application documents, technical specifications, pictures, supporting calculations, measurement and verification plan, disposal certificates, invoices and proof of payments.

3.1 Components and Services

The solution must include:

- A. All software, middleware, and hardware components necessary to capture, store, analyze and transmit existing building points data;
- B. Application Programming Interfaces (APIs) (usually implemented through Web services) for a third party to access collected energy meter data and all information regarding detected faults (and/or work orders);
- C. Building Data Analytics and Fault Detection and Diagnostics (BDA/FDD) platform and services (detailed in [3.1.43-1.3](#));

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- D. Initial installation and configuration of the system that will interface with the Building Automation Systems (BAS) and with the system used for collecting building occupancy data;
- E. All software, hardware, and firmware upgrades which may become available during the Contract period, including new modules that include features previously unavailable in the base product.
- F. All support services provided during the period of performance.

The components and services outlined above are described in detail in the subsequent sections.

3.1.1 Building Automation System (BAS) Data Collection

The Contractor must provide a flexible and scalable solution, including all necessary hardware, software, middleware, and technical support, to collect pertinent data from the existing Building Automation System (BAS) in the target building. This must include any and all connectivity to interface with the existing BAS (including, but not limited to, gateways, routers, wiring etc.) and for transferring collected data to the Contractor's data repository.

The BAS data collection must be on a real-time basis (24 hours per day and 7 days per week) and must be at an interval of 5 minutes or less.

3.1.2 Building Occupancy Data Collection

Building occupancy is defined as the quantity of people residing in a building at a given point in time.

The Contractor must provide a solution to capture and display the building occupancy data. The building occupancy data must be stored, trended and presented in easily understandable dashboards accessible to Canada stakeholders. The solution must be capable of collecting building occupancy data at intervals of 60 minutes or less. The dashboard must be capable of updating the building occupancy information at least once an hour.

3.1.3 Energy Metering Data Collection

The Contractor must provide a solution to capture and analyze energy meter data on a real-time basis. The energy meter data must include all of the following (if present in the building): electrical power, natural gas, steam, hot water, and chilled water. This real time energy consumption data must be stored, analyzed, trended and presented in easily understandable real-time dashboards accessible to Canada stakeholders. The energy metering data collection must be at an interval of 15 minutes or less.

If such energy meter data are available through a database owned by Canada, the Contractor needs to consider the cost for connection to this database. Otherwise, the Contractor must arrange integration of energy meters to the BAS and include the integration cost in the total pricing of the contract as a result of a call-up against the Standing Offer. Canada shall provide the appropriate contacts to get cost estimation for such energy meters integration during the RFP response phase arising from a call-up.

3.1.4 Building Data Analytics and Fault Detection and Diagnostics

- 3.1.4.1 The Contractor must provide Building Data Analytics and Fault Detection and Diagnostics (BDA/FDD) in conformance with this section.
- 3.1.4.2 The BDA/FDD must have the ability to mine vast amounts of data quickly and apply software-based algorithms to identify and define trends so that more proactive management of building systems can occur. The BDA/FDD must identify patterns that traditional BAS/BMS systems often overlook, draw conclusions, notify stakeholders and offer corrective measures for issues in building mechanical and control systems via proactive automated maintenance recommendations before they manifest themselves in ways that cause downtime or prolonged periods of inefficient operation.
- 3.1.4.3 Results of the building data analytics must be reviewed by the Contractor's Subject Matter Expert before being submitted to the building operator as a notification/work order. Such

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notification must include problem identification and recommended corrective measures and/or potential sources of the anomaly.

3.1.4.4 The BDA/FDD must provide:

- A. Ability to allow building managers to optimize on-going operations through a series of processes including, but not limited to, fault based analysis, continuous evaluation of zones, set points, schedules, competing air handlers, unbalanced airflows, control component degradation, sensor failures, valve leakage, and loose fan belts;
- B. Advanced continuous commissioning strategies capable of taking into account fault detection prior to seasonal weather changes (proactive building maintenance based on geographical and seasonal variables);
- C. A response or notification in a form of email or work order in response to a detected fault, alarm, or operation anomaly;
- D. Management exception reports, trigger alarms, or notifications and automated work orders.
- E. A summary of faults, alarms, or operation anomalies; and recorded distribution of notifications to Property Managers, Senior Property Managers, O&M Contractors, metering Contractors, specialized subject area engineers, and commissioning agents.

3.1.5 Continuous Commissioning and Building Optimization

The Contractor must establish an ongoing process to resolve operating problems, improve occupant comfort, optimize energy use and identify potential retrofits to existing buildings and facilities. The process will ensure that the building, facilities and systems operate optimally to meet the current requirements.

The solution must capture energy consumption/demand data on an ongoing basis and provide 24/7 monitoring of any situation that may lead to excessive energy consumption and carry out real-time data analysis to identify energy savings opportunities.

To ensure building optimization, the Contractor must work with the building operator on-site and remotely to verify and optimize scheduling and system operation to assure optimal performance from the BAS.

The proposed system will not be used for automatic changes to the BAS; rather any recommended changes must be provided, by electronic means, to the building operator, who would implement the changes at his discretion.

3.1.6 User Interface

The Contractor must provide a secure Web based User Interface (UI) in conformance with this Section with no client software required on end user workstations.

The following web browser version (minimum) will be required and have to be supported:

- A. Microsoft Internet Explorer – Version 11
- B. Google Chrome – current version as of September 2016
- C. Firefox – current version as of September 2016

The UI must:

- A. Display building information simultaneously in multiple formats (e.g. AHU graphic, temperatures and trends);
- B. Include information on energy utilization, building performance, performance of major building subsystems (e.g. AHUs, chillers, boilers), and building occupancy;
- C. Display all information in both official languages (English and French) and must offer the ability to select the language for the interface;
- D. Use the SI measurement units;

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- E. Have tools that allow building engineers and stakeholders to create, analyze, view, and understand building system equipment trends;
- F. Have non-proprietary open protocol communication protocol;
- G. Have Administrative and User privileges based on distinctive user IDs that include the ability to restrict access to individual users to specific functions;
- H. Have the ability to create user defined alerts and notifications (e.g. email, pager, work orders) to building managers, engineers, and O&M Contractors to reinforce analysis discovered by the system;
- I. Have the ability to track and record the above alerts and notifications for future troubleshooting and historical analysis;
- J. Have the ability to identify notifications (work orders) that have been accepted (acknowledged) by the user and record the timestamp of such acknowledgment;
- K. Have the ability to identify notifications (work orders) that have been closed (completed) by the user and record the timestamp of such completion;
- L. Have an audit trail of changes featured under a System Administrators workbench or System Administrator only UI.

3.1.7 Demonstration of Targeted Savings

The system must calculate and make available estimates of the opportunity cost associated with not correcting an identified fault or operational inefficiency. The opportunity cost (or cost savings if fault/operational inefficiency had been corrected) must be reported as that accrued over a one-year period.

3.1.8 Data Visualisation

The Contractor must provide a solution that is able to display building- and energy- related information in the form of dashboards. These dashboards must display information on how well the operations and maintenance of the buildings are being performed. These dashboards must be customised and provide various level of information depending on the audience (building operators, building O&M service providers, property managers, subject area engineers, occupants etc.).

Information displayed must be updated at least once an hour and must include:

- A. Work orders history;
- B. Current open work orders (by priority and by cost/savings), including the time since the work order was created;
- C. Energy consumption (compared to baseline, normalised to weather) in absolute values and as a ratio compared to baseline;
- D. Building occupancy;
- E. Energy savings per period (e.g. annual, since a specific date) in absolute values and as a ratio compared to baseline;
- F. Work orders priority (according to estimated targeted savings (as described in Section [3.1.73.1.6](#)));
- G. Operations and Maintenance events occurring in the building; and
- H. Weather information.

3.1.9 Building Maintenance Service Performance Monitoring

The solution must provide measures to monitor and track the performance of building O&M service providers related to following KPIs (key performance indicators):

- A. A list of all equipment and all control points that are monitored under coverage of the contract resulting from each call-up;

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- B. Records of every work order/recommendation issued during the term of the contract;
- C. Service request (or work order) data, including time stamps for receipt of service requests and completion of service requests; and
- D. Service request frequency, time to request acknowledgment, and time to service completion.
- E. The solution must be able to generate reports on the KPIs by a campus (group of buildings in close proximity), an individual building or by type of work order/recommendation (preventive maintenance, emergency service, etc.).
- F. The service performance information must be captured electronically and stored in an electronic data repository for the term of any contract resulting from each call-up. Canada personnel with proper credentials shall have real time access to this service performance information through an Internet portal by use of a web browser.

3.1.10 Reporting

A summary of energy consumption, **building occupancy**, trends and analysis, building optimisation recommendations and any additional recommendations and inferences must be provided in a monthly report.

The report must include, as a minimum, the following:

- A. A summary of activities for the period covered
- B. A summary of energy savings incurred from activities for the period covered
- C. Pending/recommended actions
- D. Summary of observations (anomalies) discovered

Monthly reporting will begin the month following implementation of the solution in a building and will be produced in the first week of the month providing a report for the previous month.

3.2 Network and Integration

The solution must be capable of integrating with the BAS systems used by Canada in order to retrieve data from the building systems.

Following is the minimum list of the systems with which the solution must be able to integrate:

- A. Alerton
- B. Andover
- C. Automated Logic
- D. Delta
- E. Honeywell
- F. Johnson Controls
- G. Reliable Controls
- H. Schneider Electric
- I. Siemens
- J. Trane
- K. VCI
- L. Walker

The solution must be capable of providing connectivity necessary for transferring building systems' data to the analytics engine for processing.

3.3 System Availability, Scalability, and Interoperability

The solution must:

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- A. Have availability at least 99% during building operating hours and at least 95% during other periods, and have no outages for more than 3 consecutive days;
- B. Be scalable to monitor additional devices and meters, integrate additional sensors, and deploy to additional buildings as needed; and
- C. Allow integration with other existing open systems or third party applications.

3.4 System Security, Privacy, and Data Sovereignty

The solution must:

- A. Provide security and protection measures in compliance with Canada's security and privacy policies.
- B. Ensure all data collected from Canada buildings are stored and maintained within the territory of Canada.

3.5 Ownership and Retention of collected data

All data collected from Canada buildings remains Canada's property.

The Contractor must retain all data collected from Canada buildings for the length of the contract and make the data available to Canada at the end of and at any time during the contract in an electronic (machine readable) form, including the complete description of the collected data.

3.6 Turnkey Solution

The Contractor will be completely responsible for providing to Canada a turnkey solution that is appropriately commissioned and operational. This must include all site coordination, electrical installations, network wiring or cellular communication setup, energy meters integration as needed, testing signal strengths, system configuration, etc. The Contractor must establish and ensure stable connectivity between the existing BAS and the Contractor's platform.

3.7 System Maintenance

The Contractor must assure that the installed system is of the most current version and provide the on-going maintenance of the installed system for the duration of the contract. If the Contractor collects a monthly, quarterly or annual maintenance/service fee, the cost of the periodical upgrades of the system must be included in that fee.

3.8 Training

The Contractor must provide and arrange for training of facility managers and operating staff during the implementation to enable the proper operation of the solution, to impart the necessary skills to operate the systems efficiently. Training may be delivered through online applications.

3.9 Additional services

Notwithstanding statements in 3.6 – Turnkey Solution, the Contractor must be able to provide additional services related to the proposed solution as requested from time to time by Canada. Such services may be required, if substantial changes are made to the Canada's building systems or the BAS.

If such services are requested and authorised by Canada, the Contractor must be able to provide these services and will be paid in accordance with hourly rates identified in Annex B.

These additional services must not be considered for continuous maintenance or any system upgrades for the equipment and control points that are monitored under coverage of the proposed solution.

Once implemented, these changes must be included in the existing service contract without additional cost to the annual fees.

REQUEST FOR STANDING OFFER (RFSO)

Smart Buildings Services

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4.3.1.4 Components and Services

The following table must be completed and included with the offer.

| SOR Reference | Mandatory Technical Requirements | Referenced Section/ Page in Offeror's Proposal |
|-------------------|---|--|
| 3.1 | Complete solution (as described in Statement of Requirements, Section 3.1 points A-F) | |
| 3.1.1 | Data collection from BAS in at least 5-minute intervals | |
| 3.1.2 | Occupancy data collection in at least 60 min intervals | |
| 3.1.3 | Energy metering data collection in at least 15-minute intervals | |
| 3.1.4.1 | Automated Fault Detection and Diagnostics using analytics and based on data collected from the BAS system | |
| 3.1.4.2 | | |
| 3.1.4.3 | Work orders generated based on outputs of the FDD system with clear description of recommended actions | |
| 3.1.4.3 | Subject Matter Expert review of anomalies and/or flags before work orders are issued | |
| 3.1.4.4.A,B and C | Capability of building optimization including but not limited to operation sequences, set-points, etc. but without direct changes to BAS | |
| 3.1.5 | | |
| 3.1.6 | User interface meeting or exceeding requirements of <i>User Interface</i> (Statement of Requirements, Section 3.1.6) | |
| 3.1.7 | Savings estimation on work orders or recommended actions | |
| 3.1.8 | Manager dashboards & operator dashboards with information displayed as per <i>Data Visualisation</i> (Statement of Requirements, Section 3.1.8) | |
| 3.1.9 | Capability of monitoring building maintenance service providers' performance | |
| 3.1.10 | Capability of monthly reporting | |
| 3.3.A | Minimum system availability: 99% during operating hours and 95% during other periods | |
| 3.4.B | Collected data stored and maintained in Canada | |
| 3.5 | Collected data remains Canada's Intellectual Property | |
| 3.6 | Turn-key solution | |

4.3.2 Point Rated Technical Requirements

Offers that meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Offers that fail to obtain the required minimum number of points specified on each criterion will be declared non-responsive. Each point rated technical criterion should be addressed separately.

Each offer must obtain a minimum 180 points total in the Point Rated Technical Requirements to be considered responsive.

In order to qualify for the rating process, proposals must respond to the following rated requirements and include the referenced Section/Page contained in the offer.

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The following table must be completed and included with the offer.

| | | Rating of Technical Requirements | Maximum points | Minimum passing points | Referenced Section/ Page in the offer |
|---|------------------------------|--|-----------------------|-------------------------------|--|
| 1 | Installation and Deployment: | Installation requirements and limitations: <ul style="list-style-type: none"> • Are there any additional pieces of equipment required? • Are there any special building conditions required/expected? • Are there any special conditions/requirements on the building's BAS? • Is coordination with subcontractors included? • Any additional pre-requisites? | 10 | 6 | |
| | | Deployment plan (based on the virtual call-up), including major milestones <ul style="list-style-type: none"> • Time required to complete first implementation • Completeness of the implementation schedule | 5 | 3 | |
| 2 | Platform | Platform: <ul style="list-style-type: none"> • What FDD and/or analytics services are performed by Offeror's staff, and which services are provided by 3rd party suppliers under Offeror's supervision? • What are the names and manufacturers of any products included in the solution? • Is the solution hardware, software, service or a combination of the above? | 25 | 15 | |
| | | Analytics - Fault Detection and Diagnostics (FDD): <ul style="list-style-type: none"> • How the analytics platform performs fault detection and diagnostics? • The level of automation of this system, vs. how much is manual? • At what point, if at all, the Subject Matter Experts are involved in evaluation of the diagnostics and work orders and in formulating the recommendations/work orders? • Is equipment performance analysis and recommendations for continuous commissioning included in the solution? | 40 | 24 | |
| | | Energy Analysis <ul style="list-style-type: none"> • type of energy analysis that is carried out and reports produced • methodology used to identify anomalies /deviations • practices with respect to making recommendations to Canada for any enhancement / changes | 40 | 24 | |

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| | | Rating of Technical Requirements | Maximum points | Minimum passing points | Referenced Section/ Page in the offer |
|---|-------------|---|-----------------------|-------------------------------|--|
| | | System's capability to dispatch work orders for specific issues at the equipment and/or device level. <ul style="list-style-type: none"> • ability to identify the issue through rule-based engines and analytics • ability to document what was discovered • clear, actionable advice to Canada facility management team and the service providers • tracking of the results of service providers' actions over time | 20 | 12 | |
| | | Measurement and Verification <ul style="list-style-type: none"> • Verification and reporting on savings achieved • Measurement and reporting, with respect to consumption, equipment performance, building comfort etc. • Methods used to demonstrate how targeted savings are determined | 20 | 12 | |
| | | Continuous commissioning and building optimization <ul style="list-style-type: none"> • Ability of the system to provide actionable recommendations for the building operators | 5 | 3 | |
| | | Content and quality of reporting | 5 | 3 | |
| 3 | Integration | System, integration, and connectivity <ul style="list-style-type: none"> • Integration with the building's BAS and metering systems • Expectations of how the building data provided by Canada will need to be configured and passed to Offeror's system, if any • Network architecture • Separation from Canada's networks on site • Connectivity to the analytics engine • Any requirements (pre-requisites) for connectivity between the BAS and the Offeror's analytics engine • Security of the connectivity solution • Flow chart showing how the proposed solution integrates with existing systems and data sources | 25 | 15 | |
| | | Limitations/exclusions on connectivity and BAS systems. <ul style="list-style-type: none"> • Offeror's ability to provide connectivity to all systems listed in Statement of Requirements (p.3.2 Network and Integration) • Any additional exclusions or limitations | 15 | 9 | |

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| | | Rating of Technical Requirements | Maximum points | Minimum passing points | Referenced Section/ Page in the offer |
|---|----------|---|-----------------------|-------------------------------|--|
| | | Availability of integration and data exchange with 3rd party applications (APIs, web services, access to collected data, access to work orders database) | 10 | 6 | |
| 4 | Services | <p>Operations:</p> <ul style="list-style-type: none"> • service operation capacity of the organization including service call dispatch operations, service call communications with technical personnel, and internal process controls designed to ensure timely and closed loop performance • information on systems and procedures for maintaining data integrity (e.g. security, backups, business continuity) | 10 | 6 | |
| | | Service levels and KPIs as proposed by the Offeror | 5 | 3 | |
| | | <p>Command Centre operations and support</p> <ul style="list-style-type: none"> • Hours of availability • Subject Matter Expert availability • Readiness to provide services, as required (e.g. facilities and personnel already in place) | 5 | 3 | |
| | | Ability to extend the solution to additional buildings (including integration) | 10 | 6 | |
| | | Capability of providing additional services (e.g. customized analytics, dashboards) upon Canada's request. | 5 | 3 | |
| | | <p>Customer service</p> <ul style="list-style-type: none"> • standard response time to customer requests • handling of customer complaints • service levels and product quality | 5 | 3 | |
| | | Training availability (information on Offeror-provided initial training to building operation and maintenance staff for the proper maintenance of the system) | 5 | 3 | |
| | | TOTAL TECHNICAL POINTS: | 265 | | |

**Request for Standing Offer (RFSO)
Smart Building Technologies
EN438-170958**

Annex B – Revised – December 09, 2016

Financial Offer
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Offeror Name and Address:

I/ We the Offeror, when requested by the Standing Offer Authority during the period of the Standing Offer, will calculate individual project estimates (excluding H.S.T.) in accordance with the information provided in the following tables.

Unless otherwise approved in writing by the Standing Offer Authority, I/we the Offeror undertake:

- a) To employ only those classes of persons with skill levels appropriate to each task, as defined in the Scope of Work section of each call-up.
- b) To prorate accordingly to cover the actual time worked, where work performed using the Time-Based Fee Method, is of a duration of less than one hour.
- c) To provide a full and comprehensive list of names of each individual to be assigned to a project subject to a call-up of Services.

Signature of Offeror:

Name _____
Title _____

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The following tables must be completed and submitted with the offer.

The Financial Offer is divided into Part 1 – Pricing Schedule 1 – Firm Price, Part 2 – Pricing Schedule 2- “Additional Services” and Part 3 – Total Assessed Proposal Price.

A call-up may be issued at any time during the period of the Standing Offer. The rates provided in this financial offer apply for call-ups made in the first year of the Standing Offer. The rates for call-ups made in subsequent years of the Standing Offer are subject to an annual inflation adjustment as of April 1. The adjustment shall be 75% of the increase in the National Consumer Price Index (CPI) calculated over the previous calendar year. Any adjustments made in years 2 to 5 of the Standing Offer will be calculated on the most recent previous rates. Where the CPI rate is a negative value, it shall be treated as zero for the purposes of this adjustment.

The adjusted prices will apply to the entire period of the contract resulting from the call-up. Therefore, contracted rates are not subject to price adjustment. See example below in Table 2.

Part 1 – Pricing Schedule 1 – Firm Price

The Contractor must:

1. Provide a turnkey solution pricing for the buildings listed in the Virtual Call-up (Annex D). The firm initial installation cost will be calculated using two elements: a fixed (per building) cost and a cost related to the size of the building (the Total Inside Gross Area of the building) – a per square metre cost. This initial installation cost does not include maintenance, monitoring and service management. **Provide the cost for the building occupancy data collection service as a separate item, as a fixed cost per building.**
2. Provide an annual monitoring service pricing per square meter for the buildings listed. This cost must also include periodic system updates (hardware and software) and system maintenance.
3. Provide cost estimate for additional services.

Offerors may choose any combination (such as fixed cost per building or cost per square metre or a combination of both for (a) below - initial installation cost) for their financial offer for determining the cost to the crown. In order for the Financial Offer to be accepted, all cells must be completed with a numerical value including \$0 values.

Inside gross area is defined as the total area within the building envelope. This includes, but is not limited to office space, common areas, mechanical rooms, parking, and commercial space.

Provide detailed pricing for the following items:

Table 1: Call-up Made in First Year of Standing Offer

| Item | Fixed Cost per building (A) | Cost/m ² (B) | Estimated Total Inside Gross Area for the Virtual Call-up (C) | Extended value for the Virtual Call-up |
|--|-----------------------------|-------------------------|---|--|
| a) Initial installation cost (for virtual call-up) excluding maintenance, monitoring and service management costs. The same cost will apply to any additional buildings. | \$ | \$ | 437,147 m ² | (A * 12 + B * C) \$ |

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| | | | | |
|--|----|--|------------------------|----------------|
| b) Implementation cost for building occupancy data collection service, excluding maintenance, monitoring and service management costs. The same cost will apply to any additional buildings. | \$ | | | (A * 12) \$ |
| c) Maintenance, monitoring and service management (ongoing) – Call-up Year 1 | \$ | | 437,147 m ² | (B * C) \$ |
| d) Maintenance, monitoring and service management (ongoing) – Call-up Year 2 | \$ | | 437,147 m ² | (B * C) \$ |
| (i) Total Cost for 2 firm years = (a+b+c+d) | | | | \$ |
| e) Maintenance, monitoring and service management (ongoing) – Call-up Year 3 (Option Year 1-contract) | \$ | | 437,147 m ² | (B * C) \$ |
| f) Maintenance, monitoring and service management (ongoing) – Call-up Year 4 (Option Year 2 - contract) | \$ | | 437,147 m ² | (B * C) \$ |
| g) Maintenance, monitoring and service management (ongoing) – Call-up Year 5 (Option Year 3 - contract) | \$ | | 437,147 m ² | (B * C) \$ |
| (ii) Total Cost for 3 option years = (e+f+g) | | | | \$ |
| Total Cost for 5 years= (i) + (ii) | | | | \$ |

The following example shows how an adjustment would be made to a hypothetical bid, using an increase in the National Consumer Price Index of 2%.

Table 2: Example of Price Adjustment

| Item | Call-up Made in First Year of Standing Offer | Call-up Made in Second Year of Standing Offer |
|--|--|---|
| a) Initial installation cost (for virtual call-up) excluding maintenance, monitoring and service management costs. The same cost will apply to any additional buildings. | \$100,000 | \$101,500 |
| b) Maintenance, monitoring and service management (ongoing) – Call-up Year 1 | \$25,000 | \$25,375 |
| c) Maintenance, monitoring and service management (ongoing) – Call-up Year 2 | \$25,000 | \$25,375 |
| d) Maintenance, monitoring and service management (ongoing) – Call-up Year 3 (Option Year 1-contract) | \$25,000 | \$25,375 |
| e) Maintenance, monitoring and service management (ongoing) – Call-up Year 4 (Option Year 2 - contract) | \$25,000 | \$25,375 |
| f) Maintenance, monitoring and service management (ongoing) – Call-up Year 5 (Option Year 3 - contract) | \$25,000 | \$25,375 |

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Please note that the “Maintenance, monitoring and service management fees” for subsequent years for the call-ups made in the first year of Standing Offer remain the same (are not adjusted) for the duration of the contract resulting from the call-up.

Part 2 – Pricing Schedule 2 – Cost Estimate Form for Additional Services

Payments for work performed under this portion of the contract must be approved by the technical authority.

a) Labour cost

Additional services as described in Annex A - PWGSC Statement of Requirement EN438-170958, will be conducted on an “Additional Services Requested” basis, where charges shall be made for actual labour. When “Additional Services Requested” work is requested during the contract period, the contractor must complete and submit the Table in Annex G - Cost Estimate Form “Additional Services”. Written authorization must be obtained from the Technical Authority prior to conducting any extra work.

The Contractor shall be paid for work at an hourly rate in accordance with Table 3 and will not be entitled to any additional compensation for any variation between the hours negotiated for the additional services and hours actually worked.

Estimated quantity of hours per year for extra work is for evaluation purposes only.

Submit a Firm All-inclusive Labour Rate (including overhead, parking, profit, and all related costs) in Canadian funds.

LABOUR: Fixed hourly rate per Category will be as follows. Payment will be made for hours actually worked with no provision for annual leave, statutory holidays and sick leave.

Table 3: Labour Rates

| Direct Labour | | Estimated number of hours (A) | Hourly Rate (B) | Total (AxB) |
|---|-----------------------|-------------------------------|-----------------|-------------|
| Regular Working Hours: Monday to Friday 7h30 to 16h30 | Project Manager | 5 | \$ | \$ |
| | Subject Matter Expert | 15 | \$ | \$ |
| Sub Total | | | | \$ |

In the case of error in the extension of prices, the unit price will govern. Canada may enter into contract without negotiation.

Part 3 – TOTAL ASSESSED PROPOSAL PRICE:

| | |
|--|----|
| 1. Pricing Schedule 1 – Firm Price – Total Cost for 5 years | \$ |
| 2. Pricing Schedule 2 – Cost for Additional Services | \$ |
| TOTAL ASSESSED PRICE ((1) + (2)) | \$ |

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The following is the Travel & Living Clause that is applicable for Call-ups issued:

1. Canada will not accept any travel and living expenses incurred by the Contractor in the performance of the Work, for services provided within 100 km of the Contractor's place of business in Canada.
2. For Services provided outside 100 km of the Contractor's place of business in Canada, the Contractor will be reimbursed for its authorized travel and living expenses reasonably and properly incurred in the performance of the Work done, delivered or performed, at cost, without any allowance for profit and administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the National Joint Council Travel Directive and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".
3. Canada will not accept any travel and living expenses incurred by the Contractor as a consequence of any relocation of personnel required to satisfy the terms of this Contract.
4. All travel must have the prior authorization of the Identified User. The authorized travel and living expenses will be paid upon submission of an itemized statement supported by receipt vouchers. All payments are subject to government audit.