



**RETURN BIDS TO:**

**RETOURNER LES SOUMISSIONS À:**

**Bid Receiving Public Works and Government  
Services Canada/Réception des soumissions Travaux  
publics et Services gouvernementaux Canada**  
800 Burrard Street, Room 219  
800, rue Burrard, pièce 219  
Vancouver, B.C.  
Vancouver  
British Columbia  
V6Z 0B9  
Bid Fax: (604) 775-9381

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

Departmental Individual Standing Offer (DISO)  
Offre à commandes individuelle du département(OCID)

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

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

**Comments - Commentaires**

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

**Issuing Office - Bureau de distribution**  
Public Works and Government Services Canada - Pacific  
Region  
800 Burrard Street, Room 219  
800, rue Burrard, pièce 219  
Vancouver, B.C.  
V6Z 0B9  
British C

<b>Title - Sujet</b> Building Condition Report Services	
<b>Solicitation No. - N° de l'invitation</b> EZ899-173144/A	<b>Date</b> 2017-10-27
<b>Client Reference No. - N° de référence du client</b>	<b>GETS Ref. No. - N° de réf. de SEAG</b> PW-\$TPV-028-8221
<b>File No. - N° de dossier</b> TPV-6-39396 (028)	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2017-12-11</b>	
<b>Delivery Required - Livraison exigée</b> See Herein	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Lam(TPV), Tian	<b>Buyer Id - Id de l'acheteur</b> tpv028
<b>Telephone No. - N° de téléphone</b> (604)363-7968 ( )	<b>FAX No. - N° de FAX</b> (604)775-6633
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> PWGSC - Various Locations, BC	
<b>Security - Sécurité</b> This request for a Standing Offer does not include provisions for security. Cette Demande d'offre à commandes ne comprend pas des dispositions en matière de sécurité.	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

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

**Where “PWGSC” appears in this bid solicitation and the resulting Standing Offer and Call-Ups, this means “PSPC” in the context of the Terms, Conditions and Instructions**

**Where “Public Works and Government Services Canada” appears in this bid solicitation and the resulting Standing Offer and Call-Ups, this means “Public Services and Procurement Canada” in the context of the Terms, Conditions and Instructions**

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Solicitation No. – N° de l'invitation  
EZ899-173144/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
tpv028

Client Ref. No. - N° de ref. du client

File No. - N° du dossier

CCC No./N° CCC - FMS No./N° VME

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- SRE 3 Submission Requirements and Evaluation
- SRE 4 Price of Services
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- Appendix A - Declaration/Certifications Form
- Appendix B - Price Proposal Form
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## SUPPLEMENTARY INSTRUCTIONS TO PROPONENTS (SI)

### SI 1 Integrity Provisions – Declaration of Convicted Offences

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

### SI 2 Federal Contractors Program for Employment Equity - Certification

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

Canada will have the right to declare a proposal non-responsive, or to set-aside a Standing Offer, if the Proponent, or any member of the Proponent if the Proponent is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of issuing of a Standing Offer or during the period of the Standing Offer.

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

The Proponent must provide the Contracting Authority with a completed Federal Contractors Program for Employment Equity - Certification (see Appendix A - Declaration/Certifications Form), before the issuance of a Standing Offer. If the Proponent is a Joint Venture, the Proponent must provide the Contracting Authority with a completed Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

### SI 3 Security Requirements

Proponents are hereby informed that there is a strong possibility that some call-ups against the Standing Offers might require that the consultants and their personnel possesses a Facility Security Clearance (FSC) at the SECRET level issued by the Canadian Industrial Security Directorate (CISD) of Public Works and Government Services Canada (PWGSC).

Should the successful proponents not have the level of security indicated above, PWGSC shall sponsor the successful proponents to allow CISD to initiate procedures for security clearance. CISD, by letter, shall forward documentation to the successful proponents for completion.

Proponents desiring such sponsorship should so indicate in their covering letter with their proposal.

Successful proponent(s) issued a standing offer as a result of this RFSO, not possessing the required security clearance at time of call up, will be bypassed and PWGSC will proceed to the next consultant who possesses the required security clearance and it is furthest away from the ideal business distribution. Refer to the Standing Offer Particulars for information regarding ideal business distribution.

## GENERAL INSTRUCTIONS TO PROPONENTS (GI)

### Integrity Provisions – Proposal

1. The *Ineligibility and Suspension Policy* (the “Policy”) in effect on the date the Request for Standing Offers (RFSO) is issued, and all related Directives in effect on that date, are incorporated by reference into, and form a binding part of the RFSO. The Proponent must comply with the Policy and Directives, which can be found at <http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>.
2. Under the Policy, charges and convictions of certain offences against a Supplier, its affiliates or first tier sub-consultants, and other circumstances, will or may result in a determination by Public Works and Government Services Canada (PWGSC) that the Supplier is ineligible to be issued or is suspended from being issued a standing offer and to enter into a contract with Canada. The list of ineligible and suspended Suppliers is contained in PWGSC’s Integrity Database. The Policy describes how enquiries can be made regarding the ineligibility or suspension of Suppliers.
3. In addition to all other information required in the Request for Standing Offers, the Proponent must provide the following:
  - a. by the time stated in the Policy, all information required by the Policy described under the heading “Information to be Provided when Bidding, Contracting or Entering into a Real Property Agreement”; and
  - b. with its bid, a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier sub-consultants that, to the best of its knowledge and belief, may be similar to one of the listed offences in the Policy. The list of foreign criminal charges and convictions must be submitted using an Integrity Declaration Form, which can be found at <http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>.
4. Subject to subsection 5, by submitting a bid in response to this Request for Standing Offers, the Proponent certifies that:
  - a. it has read and understands the [Ineligibility and Suspension Policy](#);
  - b. it understands that certain domestic and foreign criminal charges and convictions, and other circumstances, as described in the Policy, will or may result in a determination of ineligibility or suspension under the Policy;
  - c. it is aware that Canada may request additional information, certifications, and validations from the Proponent or a third party for purposes of making a determination of ineligibility or suspension;
  - d. it has provided with its bid a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier sub-consultants that, to the best of its knowledge and belief, may be similar to one of the listed offences in the Policy;
  - e. none of the domestic criminal offences, and other circumstances, described in the Policy that will or may result in a determination of ineligibility or suspension, apply to it, its affiliates and its proposed first tier sub-consultants; and
  - f. it is not aware of a determination of ineligibility or suspension issued by PWGSC that applies to it.

5. Where a Proponent is unable to provide any of the certifications required by subsection 4, it must submit with its bid a completed Integrity Declaration Form, which can be found at <http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>.
6. Canada will declare non-responsive any bid in respect of which the information requested is incomplete or inaccurate, or in respect of which the information contained in a certification or declaration is found by Canada to be false or misleading in any respect. If Canada establishes after issuance of the Standing Offer that the Proponent provided a false or misleading certification or declaration, Canada may set aside the Standing Offer and terminate for default any resulting contracts. Pursuant to the Policy, Canada may also determine the Proponent to be ineligible for issuance of a standing offer for providing a false or misleading certification or declaration.

## **GI 1 Definitions**

In this Request for Standing Offers (RFSO), the following words or phrases have the corresponding meaning.

**"Applicable Taxes":**

The Goods and Services Tax (GST), the Harmonized Sales Tax (HST), and any provincial tax, by law, payable by Canada such as, the Quebec Sales Tax (QST) as of April 1, 2013.

**"Consultant Team":**

The team of consultants, specialists and subconsultants, including the Proponent, proposed by the Proponent to perform the services required.

**"Key Personnel":**

Staff of the Proponent, subconsultants and specialists proposed to be assigned to this project.

**"Price Rating":**

A rating assigned to the price component of a proposal and subsequently used to establish a Price Score for inclusion as a percentage of the total score to be established following the evaluation and rating of technical proposals.

**"Proponent":**

"Proponent" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a proposal to provide services under a call-up resulting from a standing offer. It does not include the parent, subsidiaries or other affiliates of the Proponent, or its sub-consultants.

**"PWGSC Evaluation Board":**

The board established to evaluate and rate proposals. Board members represent a broad cross-section of professional qualifications and experience.

**"Technical Rating":**

A rating assigned to the technical component of a proposal in the selection procedure and subsequently used to establish a Technical Score for inclusion as a percentage of the total score.

## **GI 2 Introduction**

1. Public Works and Government Services Canada (PWGSC) is inviting consulting firms with Architectural or Engineering expertise to submit proposals for Standing Offers. The selected consultants shall provide a range of services as identified in the Required Services section of this document for building projects in the province of British Columbia and Yukon Territory.

2. Proponents shall be licensed or eligible to be licensed to practise in the province of British Columbia and Yukon territory. If a Proponent is licensed to practise in only one of the two provinces, then that Proponent must be eligible and willing to be licensed in the province in which they are not licensed. Firms should be able to demonstrate successful delivery of these services for a broad variety of projects over the last five (5) years. In general, the firm and its personnel will be evaluated on the basis of their demonstrated understanding of the scope of services, their approach and methodology to providing those services, the quality of their relevant experience in this area, as well as the cost of the provision of the services.
3. It is PWGSC's intention to authorize up to five (5) Standing Offers, each for a period of five (5) years from the date of issuing the Standing Offers. The total dollar value of all Standing Offers is estimated to be \$4,250,000.00 (Applicable Taxes included). Individual call-ups will vary, up to a maximum of \$1,500,000.00 (Applicable Taxes included). Proponents should note that there is no guarantee that the full or any amount of the Standing Offers will be called-up; PWGSC will issue call-ups only when the specific services to be provided under the Standing Offer are needed. Please refer to Section SP5, CALL-UP PROCEDURE.
4. This procurement is subject to the provisions of the North American Free Trade Agreement (NAFTA) World Trade Organization - Agreement on Government Procurement (WTO-AGP) and Canadian Free Trade Agreement (CFTA).

### **GI 3 Procurement Business Number**

Proponents are required to have a Procurement Business Number (PBN) before issuance of a standing offer. Proponents may register for a PBN on line at Supplier Registration Information (<https://srisupplier.contractsCanada.gc.ca/>). For non-Internet registration, proponents may contact the InfoLine at 1-800-811-1148 to obtain the telephone number of the nearest Supplier Registration Agent.

### **GI 4 Contracting Authority and Departmental Representative**

1. The Contracting Authority for this Request for Standing Offer is:  
  
Public Services and Procurement Canada  
Tian Lam, Supply Specialist  
219-800 Burrard Street  
Vancouver, BC  
V6V 2S8
2. The Contracting Authority is responsible for the establishment of the Standing Offer, its administration, and any contractual issues relating to individual call-ups.
3. A Departmental Representative will be identified at time of each individual Call-Up.
4. The Departmental Representative will be responsible for all matters concerning the technical content of the work under the Call-Up.

### **GI 5 Quantity**

The level of services and estimated expenditure specified in the Request for Standing Offer are only an approximation of requirements given in good faith. The making of a proposal by the Proponent shall not constitute an agreement by Canada. Canada may make one or several call-ups against a standing offer.

### **GI 6 PWGSC Obligation**

A Request for Standing Offer does not commit PWGSC to authorize the utilization of a standing offer or to pay any cost incurred in the submission of proposals, or cost incurred in making necessary studies for the preparation thereof, or to procure or contract for any services. PWGSC reserves the right to reject or authorize for utilization any proposal in whole or in part, with or without further discussion or negotiation. Canada reserves the right to cancel or amend the Request for Standing Offer at any time.

#### **GI 7 Responsive Proposals**

To be considered responsive, a proposal must meet all of the mandatory requirements set out in the Request for Standing Offer. No further consideration in the selection procedure will be given to a Proponent submitting a non-responsive proposal. Proponents that submitted non-responsive proposals are notified accordingly.

#### **GI 8 Communications - Solicitation Period**

1. Questions or requests for clarification during the solicitation period must be submitted in writing to the Contracting Authority named on the Request for Standing Offer - Page 1 as early as possible. **Enquiries should be received no later than ten (10) working days prior to the closing date identified on the front page of the Request for Standing Offer** Enquiries received after that time may not be answered.
2. To ensure the integrity of the competitive bid process, enquiries and other communications regarding the RFSO must be directed only to the Contracting Authority identified in the RFSO. Failure to comply with this requirement may result in the proposal being declared non-responsive.
3. To ensure consistency and quality of information provided to proponents, significant enquiries received and their replies will be posted on the Government Electronic Tendering Service (GETS).

#### **GI 9 Overview of Selection Process**

1. The Standing Offer selection process is as follows:
  - a) a Request for Standing Offer is obtained by proponents through the GETS;
  - b) in response to the Request for Standing Offer, interested proponents shall submit their proposals using a "two-envelope" procedure, in which proponents submit the "technical" component of their proposal in one envelope and the proposed price of the services (price proposal) in a second envelope as further described in GI 10.3 below;
  - c) responsive proposals are reviewed, evaluated and rated by a PWGSC Evaluation Board in accordance with the criteria, components and weight factors set out in the Request for Standing Offer;
  - d) PWGSC may issue a standing offer to the successful proponents;
  - e) Proponents are notified of the results within one week after PWGSC has entered into a standing offer arrangement with the successful proponents.

#### **GI 10 Submission of Proposal**

1. Canada requires that each proposal, at closing date and time or upon request from the Contracting Authority, be signed by the Proponent or by an authorized representative of the

- Proponent. If a proposal is submitted by a joint venture, it must be in accordance with section GI18.
2. It is the Proponent's responsibility to:
    - a) obtain clarification of the requirements contained in the Request for Standing Offer, if necessary, before submitting a proposal;
    - b) submit an original of the proposal plus the specified number of copies, duly completed, IN THE FORMAT REQUESTED, on or before the closing date and time set for receipt of proposals;
    - c) send its proposal only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit specified on page 1 of the Request for Standing Offer or to the address specified in the Request for Standing Offer;
    - d) ensure that the Proponent's name, return address, the solicitation number and description, and solicitation closing date and time are clearly visible on the envelope or the parcel(s) containing the proposal; and
    - e) provide a comprehensive and sufficiently detailed proposal that will permit a complete evaluation in accordance with the criteria set out in the Request for Standing Offer.
  3. The technical and price components of the proposal must be submitted in separate, easily identified envelopes in accordance with the instructions contained in the proposal document. Both envelopes shall be submitted as one package which shall clearly and conspicuously display and indicate on the outside of the package the information identified in paragraph 2. d) above.
  4. Timely and correct delivery of proposals to the office designated for receipt of proposals is the sole responsibility of the Proponent. Public Works and Government Services Canada will not assume or have transferred to it those responsibilities. All risks and consequences of incorrect delivery of proposals are the responsibility of the Proponent.
  5. The evaluation of proposals may result in authorization to utilize one or more Standing Offers in whole or in part, taking into consideration the evaluation criteria and selection method stated herein. The lowest or any proposal will not necessarily be authorized. In case of error in the calculation of prices, the unit prices will govern.
  6. The proposal should completely and thoroughly address each element of the requirements as enumerated in the Request for Standing Offer. It is also essential that the elements contained in the proposal be stated in a clear and concise manner.
  7. Proposal documents and supporting information may be submitted in either English or French.
  8. Canada will make available Notices of Proposed Procurement (NPP), RFSOs and related documents for download through the Government Electronic Tendering Service (GETS). Canada is not responsible and will not assume any liabilities whatsoever for the information found on websites of third parties. In the event an NPP, RFSO or related documentation would be amended, Canada will not be sending notifications. Canada will post all amendments using GETS. It is the sole responsibility of the Proponent to regularly consult GETS for the most up-to-date information. Canada will not be liable for any oversight on the Proponent's part nor for notification services offered by a third party.

### **GI 11 Non-Acceptance of Electronically Transmitted Proposals**

Due to the nature of this solicitation, a complete technical proposal, as well as a cost of services proposal (submitted under separate cover), with supporting information is required to allow a proper evaluation to be conducted. Electronic transmission of the proposal by such means as electronic mail or facsimile is not considered to be practical, and therefore, will not be accepted.

### **GI 12 Evaluation of Price**

The price proposal must be submitted in Canadian dollars and will be evaluated excluding Applicable Taxes.

### **GI 13 Limitation of Submissions**

1. A Proponent may not submit more than one proposal. This limitation also applies to the persons or entities in the case of a joint venture. If more than one proposal is received from a Proponent (or, in the case of a joint venture, from the persons or entities), all such proposals shall be rejected and no further consideration shall be given.
2. A joint venture is defined as an association of two or more parties which combine their money, property, knowledge, skills, time or other resources in a joint business enterprise agreeing to share the profits and the losses and each having some degree of control over the enterprise.
3. An arrangement whereby Canada contracts directly with a consultant who may retain sub-consultants or specialist consultants to perform portions of the services is not a joint venture arrangement. A sub-consultant or specialist consultant may, therefore, be proposed as part of the consultant team by more than one Proponent. The Proponent warrants that it has written permission from such sub-consultant or specialist consultant to propose their services in relation to the services to be performed.
4. Notwithstanding paragraph 3. above, in order to avoid any conflict of interest, or any perception of conflict of interest, a Proponent shall not include in its submission another Proponent as a member of its consultant team, as a sub-consultant or specialist consultant.
5. Any joint venture entered into for the provision of professional services or other services must be in full compliance with the requirements of any provincial or territorial law pertaining thereto in the Province or Territory in which the project is located.

### **GI 14 Licensing Requirements**

1. Consultant team members and key personnel shall be, or be eligible to be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial law in the province of the work.
2. By virtue of submission of a proposal, the Proponent certifies that the Proponent's consultant team and key personnel are in compliance with the requirements of paragraph 1 above. The Proponent acknowledges that PWGSC reserves the right to verify any information in this regard and that false or erroneous certification may result in the proposal being declared non-responsive.

### **GI 15 Rejection of Proposal**

1. Canada may reject a proposal where any of the following circumstances is present:

- (a) the Proponent has been declared ineligible for selection, following unsatisfactory performance in a previous project as determined in accordance with the department's performance review procedures;
  - (b) an employee, sub-consultant or specialist consultant included as part of the proposal has been declared ineligible, for selection for work with the department in accordance with the performance review procedure referred to in paragraph 1.(a), which would render the employee, sub-consultant or specialist consultant ineligible to bid on the requirement, or the portion of the requirement the employee, sub-consultant or specialist consultant is to perform;
  - (c) the Proponent is bankrupt or where, for whatever reason, its activities are rendered inoperable for an extended period;
  - (d) evidence, satisfactory to Canada, of fraud, bribery, fraudulent misrepresentation or failure to comply with any law protecting individuals against any manner of discrimination, has been received with respect to the Proponent, any of its employees, any sub-consultant or any specialist consultant included as part of the proposal;
  - (e) evidence satisfactory to Canada that based on past conduct or behavior, the Proponent, a sub-consultant, a specialist consultant or a person who is to perform the Services is unsuitable or has conducted himself/herself improperly;
  - (f) with respect to current or prior transactions with the Government of Canada,
    - (i) Canada has exercised its contractual remedies of taking the services out of the consultant's hands, suspension or termination for default with respect to a contract with the Proponent, any of its employees, any sub-consultant or any specialist consultant included as part of the proposal;
    - (ii) Canada determines that the Proponent's performance on other contracts, including the quality of the services provided and the quality and timeliness of the delivery of the project, is sufficiently poor to jeopardize the successful completion of the requirement being bid on.
2. Where Canada intends to reject a proposal pursuant to subsection 1.(f), the Contracting Authority will so inform the Proponent and provide the Proponent ten (10) days within which to make representations, before making a final decision on the proposal rejection.

**GI 16 Not applicable**

**GI 17 Insurance Requirements**

1. The successful Proponent shall be required to obtain and maintain Professional Liability and Comprehensive General insurance coverage in accordance with the requirements set out elsewhere in the Request for Standing Offer documents.
2. No insurance requirement stipulated in the Request for Standing Offer documents should be construed as limiting any insurance required by federal, provincial or municipal law. Neither should it limit any coverage which the successful Proponent and other members of the consultant team may consider to be necessary for their own protection or to fulfill their obligations.
3. By virtue of submission of a proposal, the Proponent certifies that the Proponent and the other members of the consultant team as may be applicable are capable of obtaining, and will obtain

and maintain liability insurance in accordance with the requirements set out in the proposal documents.

### **GI 18 Joint Venture**

1. A joint venture is an association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to bid together on a requirement. Proponents who bid as a joint venture must indicate clearly that it is a joint venture and provide the following information:

- (a) the name of each member of the joint venture;
- (b) the Procurement Business Number of each member of the joint venture;
- (c) the name of the representative of the joint venture, i.e. the member chosen by the other members to act on their behalf, if applicable;
- (d) the name of the joint venture, if applicable.

2. If the information is not clearly provided in the proposal, the Proponent must provide the information on request from the Contracting Authority.

3. The proposal and any resulting standing offer must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of all members of the joint venture. The Contracting Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the RFSO and any resulting standing offer. If a standing offer is issued to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of any contract resulting from a call-up against the standing offer.

### **GI 19 Late Submissions**

Submissions delivered after the stipulated closing date and time will be returned unopened.

### **GI 20 Legal Capacity**

The Proponent must have the legal capacity to contract. If the Proponent is a sole proprietorship, a partnership or a corporate body, the Proponent must provide, if requested by the Contracting Authority, a statement and any requested supporting documentation indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business. This also applies to proponents submitting a proposal as a joint venture.

### **GI 21 Debriefing**

Should a Proponent desire a debriefing, the Proponent should contact the person identified on the front page of the Request for Standing Offer within 15 working days of the notification of the results of the solicitation. The debriefing will include an outline of the strengths and weaknesses of the submission, referring to the evaluation criteria. The confidentiality of information relating to other submissions will be protected. The debriefing may be provided in writing, by telephone or in person.

### **GI 22 Financial Capability**

1. Financial Capability Requirement: The Proponent must have the financial capability to fulfill this requirement. To determine the Proponent's financial capability, the Contracting Authority may, by written notice to the Proponent, require the submission of some or all of the financial information detailed below during the evaluation of proposals. The Proponent must provide the following

information to the Contracting Authority within fifteen (15) working days of the request or as specified by the Contracting Authority in the notice:

- (a) Audited financial statements, if available, or the unaudited financial statements (prepared by the Proponent's outside accounting firm, if available, or prepared in-house if no external statements have been prepared) for the Proponent's last three fiscal years, or for the years that the Proponent has been in business if this is less than three years (including, as a minimum, the Balance Sheet, the Statement of Retained Earnings, the Income Statement and any notes to the statements).
  - (b) If the date of the financial statements in (a) above is more than five months before the date of the request for information by the Contracting Authority, the Proponent must also provide, unless this is prohibited by legislation for public companies, the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement), as of two months before the date on which the Contracting Authority requests this information.
  - (c) If the Proponent has not been in business for at least one full fiscal year, the following must be provided:
    - (i) the opening Balance Sheet on commencement of business (in the case of a corporation, the date of incorporation); and
    - (ii) the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement) as of two months before the date on which the Contracting Authority requests this information.
  - (d) A certification from the Chief Financial Officer or an authorized signing officer of the Proponent that the financial information provided is complete and accurate.
  - (e) A confirmation letter from all of the financial institution(s) that have provided short-term financing to the Proponent outlining the total of lines of credit granted to the Proponent and the amount of credit that remains available and not drawn upon as of one month prior to the date on which the Contracting Authority requests this information.
2. If the Proponent is a joint venture, the financial information required by the Contracting Authority must be provided by each member of the joint venture.
  3. If the Proponent is a subsidiary of another company, then any financial information in 1. (a) to (e) above required by the Contracting Authority must be provided by the ultimate parent company. Provision of parent company financial information does not by itself satisfy the requirement for the provision of the financial information of the Proponent, and the financial capability of a parent cannot be substituted for the financial capability of the Proponent itself unless an agreement by the parent company to sign a Parental Guarantee, as drawn up by Public Works and Government Services Canada (PWGSC), is provided with the required information.
  4. Financial Information Already Provided to PWGSC: The Proponent is not required to resubmit any financial information requested by the Contracting Authority that is already on file at PWGSC with the Contract Cost Analysis, Audit and Policy Directorate of the Policy, Risk, Integrity and Strategic Management Sector, provided that within the above-noted time frame:
    - (a) the Proponent identifies to the Contracting Authority in writing the specific information that is on file and the requirement for which this information was provided; and

(b) the Proponent authorizes the use of the information for this requirement.

It is the Proponent's responsibility to confirm with the Contracting Authority that this information is still on file with PWGSC.

5. Other Information: Canada reserves the right to request from the Proponent any other information that Canada requires to conduct a complete financial capability assessment of the Proponent.
6. Confidentiality: If the Proponent provides the information required above to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as permitted by the Access to Information Act, R.S., 1985, c. A-1, Section 20(1) (b) and (c).
7. Security: In determining the Proponent's financial capability to fulfill this requirement, Canada may consider any security the Proponent is capable of providing, at the Proponent's sole expense (for example, an irrevocable letter of credit from a registered financial institution drawn in favour of Canada, a performance guarantee from a third party or some other form of security, as determined by Canada).
8. In the event that a proposal is found to be non-compliant on the basis that the Proponent is considered NOT to be financially capable of performing the subject requirement, official notification shall be provided to the Proponent.

#### **GI 23 Revision of Proposal**

A proposal submitted may be amended by letter or facsimile provided the revision is received at the office designated for the receipt of proposals, on or before the date and time set for the receipt of proposals. The revision must be on the Proponent's letterhead or bear a signature that identifies the Proponent, and must clearly identify the change(s) to be applied to the original proposal. The revision must also include the information identified in GI 10 2. d).

#### **GI 24 Performance Evaluation**

Proponents shall take note that the performance of the Consultant during and upon completion of the services shall be evaluated by Canada. The evaluation includes all or some of the following criteria: Design, Quality of Results, Management, Time and Cost. Should the Consultant's performance be considered unsatisfactory, the Consultant may be declared ineligible for future contracts. The form [PWGSC-TPSGC 2913-1](http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/documents/2913-1.pdf), SELECT - Consultant Performance Evaluation Report (<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/documents/2913-1.pdf>), is used to record the performance.

#### **GI 25 Proposal Costs**

No payment will be made for costs incurred in the preparation and submission of a proposal in response to the Request for Standing Offer. Costs associated with preparing and submitting a proposal, as well as any costs incurred by the Proponent associated with the evaluation of the proposal, are the sole responsibility of the Proponent.

#### **GI 26 Conflict of Interest - Unfair Advantage**

1. In order to protect the integrity of the procurement process, proponents are advised that Canada may reject a proposal in the following circumstances:

- (a) if the Proponent, any of its sub-consultants, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation or in any situation of conflict of interest or appearance of conflict of interest;
  - (b) if the Proponent, any of its sub-consultants, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other proponents and that would, in Canada's opinion, give or appear to give the Proponent an unfair advantage.
2. The experience acquired by a Proponent who is providing or has provided the goods and services described in the bid solicitation (or similar goods or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This Proponent remains however subject to the criteria established above.
3. Where Canada intends to reject a proposal under this section, the Contracting Authority will inform the Proponent and provide the Proponent an opportunity to make representations before making a final decision. Proponents who are in doubt about a particular situation should contact the Contracting Authority before bid closing. By submitting a proposal, the Proponent represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Proponent acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

#### **GI 27 Limitation of Liability**

Except as expressly and specifically permitted in this Request for Standing Offer, no Proponent or potential Proponent shall have any claim for any compensation of any kind whatsoever in relation to this Request for Standing Offer, or any aspect of the procurement process, and by submitting a proposal each Proponent shall be deemed to have agreed that it has no claim.

#### **GI 28 Status and Availability of Resources**

The Proponent certifies that, should it be issued a standing offer as a result of the Request for Standing Offer, every individual proposed in its proposal will be available to perform the Services resulting from a call-up against the Standing Offer as required by Canada's representatives and at the time specified in a call-up or agreed to with Canada's representatives. If the Proponent is unable to provide the services of an individual named in its proposal, the Proponent may propose a substitute with at least the same qualifications and experience. The Proponent must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement for Canada's approval in its sole discretion.

#### **GI29 Code of Conduct for Procurement - Proposal**

The Code of Conduct for Procurement provides that Proponents must respond to Requests for Standing Offers (RFSO) in an honest, fair and comprehensive manner, accurately reflect their capacity to satisfy the requirements set out in the RFSO and resulting contract, submit bids and enter into contracts only if they will fulfill all obligations of the Contract. By submitting a bid, the Proponent is certifying that it is complying with the Code of Conduct for Procurement (<http://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/contexte-context-eng.html>). Failure to comply with the Code of Conduct for Procurement may render the bid non-responsive

## STANDING OFFER PARTICULARS (SP)

### SP 1 General

1. The Consultant acknowledges that a standing offer is not a contract and that the issuance of a Standing Offer and Call-up Authority does not oblige or commit Canada to procure or contract for any services listed in the Standing Offer.
2. The Consultant offers to provide and deliver to Canada the services described in the Standing Offer, in accordance with the pricing set out in the Standing Offer if, and when the Contracting Authority may request such services, in accordance with the conditions listed at subsection 3 below.
3. The Consultant understands and agrees that:
  - a) a call-up against the Standing Offer will form a contract only for those services which have been called-up, provided that such call-up is made in accordance with the provisions of the Standing Offer;
  - b) Canada's liability is limited to that which arises from call-ups against the Standing Offer made within the period specified in the Standing Offer;
  - c) Canada has the right to procure the services specified in the Standing Offer by means of any other contract, standing offer or contracting method;
  - d) the Standing Offer cannot be assigned or transferred in whole or in part;
  - e) the Standing Offer may be set aside by Canada at any time.
4. For services from a Specialist Consultant that is not named or for which discipline is not identified in the Standing Offer, the Consultant's proposal shall include the category and name of personnel as well as their hourly rate(s) with the number of hours estimated/required by the Specialist Consultant to perform these services. A fixed fee or, where it is not possible or appropriate to agree upon a fixed fee, a time based fee to an upset limit will be established.

### SP 2 Withdrawal/Revision

In the event that the Consultant wishes to withdraw the Standing Offer after authority to call-up against the Standing Offer has been given, the Consultant must provide no less than thirty (30) days' written notice to the Contracting Authority, unless specified otherwise in the Standing Offer. The thirty (30) days' period will start upon receipt of the notification by the Contracting Authority and the withdrawal will be effective at the expiry of that period. The Consultant must fulfill any and all call-ups which are made before the expiry of that period.

The period of the Standing Offer may only be extended, or its usage increased, by the Contracting Authority issuing a revision to the Standing Offer in writing.

### SP 3 Period of the Standing Offer

The period for placing call-ups against the Standing Offer shall be for five (5) years commencing from the start date identified on the Standing Offer.

If the Standing Offer is authorized for use beyond the initial period, the Consultant offers to extend its proposal for an additional period under the same conditions and at the rates or prices specified in the Standing Offer.

The Consultant will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Contracting Authority thirty (30) days before the expiry of the Standing Offer. A revision to the Standing Offer will be issued by the Contracting Authority.

#### **SP 4 Call-Up Limitation**

Each call-up against the Standing Offer will have a maximum limitation of expenditure of \$1,500,000.00 (Applicable Taxes included). The call-up limitation includes fees and all related disbursements.

#### **SP 5 Call-Up Procedure**

1. Services will be called-up as follows:

- a) The Departmental Representative will establish the scope of services to be performed. For each individual Call-Up, consultants will be considered using a computerized distribution system. This system will track all call-ups assigned to each consultant and will maintain a running total of the dollar value of business distributed. The system will contain for each consultant an ideal business distribution percentage which has been established as follows; 30% of the business for the top ranked consultant, 25% for the 2nd ranked consultant, 20% for the 3rd ranked consultant, 15% for the 4th ranked consultant, and 10% for the 5<sup>th</sup> ranked consultant. In the event fewer than five (5) consultants are successful, the undistributed % of business will be redistributed amongst the offerors being recommended using the following formula:

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

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

- b) The Consultant will be provided the scope of services and will submit a proposal to the Departmental Representative in accordance with the fixed hourly rates established under the Standing Offer. The Consultant's proposal shall include the category of personnel, name of personnel and the number of hours estimated/required to perform the services, as well as an estimate of proposed disbursements, if applicable. If the Consultant is unable to provide the services of an individual named in its proposal (submitted in response to the Request for Standing Offer), the Consultant may propose a substitute with at least the same qualifications and experience in the estimation of Canada. The Consultant must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement for Canada's approval in its sole discretion. If the Consultant is unable to provide a substitute with similar qualifications and experience, Canada may set aside the standing offer.
- c) For services from a Specialist Consultant that is not named or for which discipline is not identified in the Standing Offer, the Consultant's proposal shall include the category and name of personnel as well as their hourly rate(s) with the number of hours estimated/required by the Specialist Consultant to perform these services. A fixed fee or, where it is not possible or appropriate to agree upon a fixed fee, a time based fee to an upset limit will be established.

- d) For the preparation of bilingual documents, the Consultant shall estimate the required number of hours and multiply by the hourly rates established in the Standing Offer. If the services of a translation firm are required to produce bilingual documents, these costs shall be treated as a disbursement.
  - e) A fixed fee or, where it is not possible or appropriate to agree upon a fixed fee, a time based fee to an upset limit will be established in accordance with the hourly rate(s) established in the Standing Offer.
  - f) Standing Offer holders not possessing the required security clearance at time of call up, will be bypassed and PWGSC will proceed to the next consultant who possesses the required security clearance and it is furthest away from the ideal business distribution.
2. The Consultant will be authorized in writing by the Contracting Authority to proceed with the services by issuance of a Call-up against the Standing Offer.
3. Any proposed changes to the scope of work are to be discussed with the Departmental Representative but any resulting changes can only be authorized by an amendment issued by the Contracting Authority.

**SP 6 Invoicing**

1. For prompt processing of invoices, include the following information on each invoice for payment:
- a) PWGSC project number;
  - b) Invoicing period with dates;
  - c) Work done to justify invoice (short narrative) for services provided
  - d) Summary of costs as follows:

Amount this invoice	(1)	Fees + Applicable Taxes = Total
Total previous invoices	(2)	Fees + Applicable Taxes = Total
Total invoiced to date	(1+2) =(3)	Fees + Applicable Taxes = Total
Agreed fees	(4)	Fees + Applicable Taxes = Total
Amount to complete	(4-3) =(5)	Fees + Applicable Taxes = Total
% Services completed this stage	(6)	
  - e) Authorized signatures of the consultant and the date.
2. Include with each invoice for authorized disbursements, receipt of original invoices (or legible copies if originals cannot be supplied) for all items claimed.

## PROJECT ADMINISTRATION (PA)

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

### PA 1.1 Coordination with PWGSC

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

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

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

Public Services and Procurement Canada or Other Government Departments will administer the project and exercises continuing control over the Consultant's services during all phases of development.

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

The Consultant shall:

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

### PA 1.2 Coordination with Sub-Consultants

The Consultant shall:

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

### PA 1.3 General Project Deliverables

Building Condition data and any requested "stand alone" tasks shall be completed as described in the Statement of Work/ Terms of Reference and delivered to PSPC in the prescribed electronic format.

### PA 1.4 Lines of Communication

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

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

#### **PA 1.5 Media**

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

Such inquiries are to be directed to the Project Manager.

#### **PA 1.6 Meetings**

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

- Client Department.
- Public Services & Procurement Canada.
- Consultant.

The Consultant shall:

- Attend meetings.

#### **PA 1.7 Project Response Time**

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

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

#### **PA 1.8 Submissions, Reviews and Approvals**

For each call-up, work in progress will be reviewed as directed in the Terms of Reference:

#### **PA 1.9 Codes, Standards, Policies, Laws, Acts, and Guidelines**

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

##### **CODES**

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

- British Columbia Electrical Safety Code.
- National Fire Code of Canada (NFC).
- British Columbia Fire Code (OFC).

## POLICES & GUIDELINES

### Treasury Board of Canada Secretariat (TBS):

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

### Public Works and Government Services Canada (PWGSC):

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

## STANDARDS

### Canadian Standards Association (CSA):

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

### Underwriters Laboratories of Canada (ULC):

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

Solicitation No. – N° de l'invitation  
EZ899-173144/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
tpv028

Client Ref. No. - N° de ref. du client

File No. - N° du dossier

CCC No./N° CCC - FMS No./N° VME

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National Fire Protection Association (NFPA):

- various.

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

- various.

National Research Council of Canada (NRC):

- Manual for Screening of Buildings for Seismic Evaluation.

Natural Resources Canada (NRCAN):

Federal Buildings Initiative.

## TERMS AND CONDITIONS

### 0220DA GENERAL CONDITIONS (GC)

#### GC 1 Definitions

**Applicable Taxes** means the Goods and Services Tax (GST), the Harmonized Sales Tax (HST), and any provincial tax, by law, payable by *Canada* such as, the Quebec Sales Tax (QST) as of April 1, 2013;

**Average Bank Rate** means the simple arithmetic mean of the *Bank Rate* in effect at 4:00 p.m. Eastern Time each day during the calendar month which immediately precedes the calendar month in which payment is made;

**Bank Rate** means the rate of interest established from time to time by the Bank of Canada as the minimum rate at which it makes short term advances to members of the Canadian Payments Association;

**Canada, Crown, Her Majesty or the Government**

means Her Majesty the Queen in right of Canada as represented by the Minister of Public Works and Government Services and any other person duly authorized to act on behalf of that minister or, if applicable, an appropriate minister to whom the Minister of Public Works and Government Services has delegated his or her powers, duties or functions and any other person duly authorized to act on behalf of that minister; **Construction Contract** means a contract entered into between *Canada* and a *Contractor* for the construction of the Project;

**Construction Contract Award Price** means the price at which a *Construction Contract* is awarded to a *Contractor*;

**Construction Cost Estimate** means an anticipated amount for which a *Contractor* will execute the construction of the Project;

**Construction Cost Limit** means that portion of the total amount of Project funds which shall not be exceeded on construction of the Project;

**Consultant** means the party identified in the Standing Offer to perform the *Consultant Services* under the Standing Offer and any subsequent Call-up, and includes the officer or employee of the *Consultant* identified in writing by the *Consultant*;

**Contracting Authority** means the party identified on the front cover page, responsible for the establishment of the Standing Offer, its amendments, administration, and any contractual issues relating to individual call-ups;

**Contractor** means a person, firm or corporation with whom *Canada* enters, or intends to enter, into a *Construction Contract*;

**Contract Price** means the amount stated in the Call-Up to be payable to the *Consultant* for the *Services*, exclusive of *Applicable Taxes*;

**Cost Plan** means the allocation of proposed costs among the various elements of the Project, as described in the *Project Brief or Terms of Reference*;

**Days** means continuous calendar days, including weekends and statutory public holidays;

**"Departmental Representative"**

means the officer or employee of Canada identified to the consultant in writing by a duly authorized departmental officer to perform the Departmental Representative's duties under the Agreement;

**Mediation** is a process of dispute resolution in which a neutral third party assists the parties involved in a dispute to negotiate their own settlement;

**Project Brief or Terms of Reference** means a document describing in sufficient detail the *Services* to be provided by the *Consultant* to permit the *Consultant* to proceed with the *Services* and may include general project information, scope of the work, site and design data, and time plan, specifically related to the Project;

**Project Schedule** means a time plan, including the sequence of tasks, milestone dates and critical dates which must be met for the implementation of the planning, design and construction phases of the Project;

**Services** means the *Services* provided by the *Consultant* and the *Services* required for the project as set forth in the Standing Offer and subsequent Call-up documents;

**Specialist Consultant** means any Architect, Professional Engineer, or other specialist, other than the *Consultant*, engaged by *Canada* directly or, at the specific request of *Canada*, engaged by the *Consultant*;

**Sub-Consultant** means any Architect, Professional Engineer, or other specialist engaged by the *Consultant* for the *Services* included in the Standing Offer or any subsequent Call-up;

**Technical Documentation** includes designs, reports, photographs, physical models, surveys, drawings, specifications, computer software developed for the purpose of the Project, computer printouts, design notes, calculations, CADD (Computer-aided Design and Drafting) files, and other data, information and material, prepared, computed, drawn, or produced and operating and maintenance manuals either prepared or collected for the Project.

**Total Estimated Cost, Revised Estimated Cost, Increase (Decrease)** on Page 1 of the Contract or Contract Amendment means an amount used for internal administrative purposes only that comprises the *Contract Price*, or the revised *Contract Price*, or the amount that would increase or decrease the *Contract Price* and the *Applicable Taxes* as evaluated by the *Contracting Authority*, and does not constitute tax advice on the part of *Canada*.

**GC 2 Interpretations**

1. Words importing the singular only also include the plural, and vice versa, where the context requires;
2. Headings or notes in the Standing Offer shall not be deemed to be part thereof, or be taken into consideration in its interpretation;
3. "Herein", "hereby", "hereof", "hereunder" and similar expressions refer to the Standing Offer as a whole and not to any particular subdivision or part thereof.

**GC 3 Not Applicable**

**GC 4 Assignment**

1. The Call-Up shall not be assigned, in whole or in part, by the *Consultant* without the prior consent of Canada.
2. An assignment of the Call-Up without such consent shall not relieve the *Consultant* or the assignee from any obligation under the Call-up, or impose any liability upon *Canada*.

#### **GC 5 Indemnification**

1. The *Consultant* shall indemnify and save harmless *Canada*, its employees and agents, from losses arising out of the errors, omissions or negligent acts of the *Consultant*, its employees and agents, in the performance of the *Services* under the Call-up that may result from the Standing Offer.
2. The *Consultant's* liability to indemnify or reimburse *Canada* under the Standing Offer shall not affect or prejudice *Canada* from exercising any other rights under law.

#### **GC 6 Notices**

1. Any notice, request, direction, consent, decision, or other communication that is required to be given or made by either party pursuant to the Standing Offer, shall be in writing, and shall be deemed to have been effectively given when:
  - (a) served personally, on the day it is delivered;
  - (b) forwarded by registered mail, on the day the postal receipt is acknowledged by the other party; or
  - (c) forwarded by facsimile or other electronic means of transmission, one working day after it was transmitted.
2. The address of either party, or the person authorized to receive notices, may be changed by notice in the manner set out in this provision.

#### **GC 7 Suspension**

1. The *Departmental Representative* may require the *Consultant* to suspend the *Services* being provided, or any part thereof, for a specified or unspecified period.
2. If a period of suspension does not exceed sixty (60) *days* and when taken together with other periods of suspension does not exceed ninety (90) *days*, the *Consultant* will, upon the expiration of that period, resume the performance of the *Services* in accordance with the terms of the Standing Offer and the relevant Call-up, subject to any agreed adjustment of the time schedule as referred to in CS 3 of clause 9999DA, *Consultant Services*.
3. If a period of suspension exceeds sixty (60) *days* or when taken together with other periods of suspension, the total exceeds ninety (90) *days*, and:
  - (a) the *Departmental Representative* and the *Consultant* agree that the performance of the *Services* shall be continued, then the *Consultant* shall resume performance of the *Services*, subject to any terms and conditions agreed upon by the *Departmental Representative* and the *Consultant*, or

(b) the *Departmental Representative* and the *Consultant* do not agree that the performance of the *Services* shall be continued, then the Call-Up shall be terminated by notice given by Canada to the *Consultant*, in accordance with the terms of GC 8.

4. Suspension costs related to this clause are as outlined in TP 8 of clause 9998DA, Terms of Payment.

#### **GC 8 Termination**

Canada may terminate any Call-up at any time in its sole discretion, and the fees paid to the *Consultant* will be in accordance with the relevant provisions in TP 9 of clause 9998DA, Terms of Payment.

#### **GC 9 Taking the *Services* Out of the *Consultant's* Hands**

1. Canada may take all or any part of the *Services* out of the *Consultant's* hands and may employ reasonable means necessary to complete such *Services* in the event that:
  - (a) The *Consultant* has become insolvent or has committed an act of bankruptcy, and has neither made a proposal to the *Consultant's* creditors nor filed a notice of intention to make such a proposal, pursuant to the *Bankruptcy and Insolvency Act*, or
  - (b) the *Consultant* fails to perform any of the *Consultant's* obligations under the Standing Offer or any of the Call-ups or, in Canada's opinion, so fails to make progress as to endanger performance of the Standing Offer or any of its call-ups, in accordance with its terms.
2. If the *Consultant* has become insolvent or has committed an act of bankruptcy, and has either made a proposal to the *Consultant's* creditors or filed a notice of intention to make such a proposal, pursuant to the *Bankruptcy and Insolvency Act*, the *Consultant* shall immediately forward a copy of the proposal or the notice of intention to the *Contracting Authority*.
3. Before the *Services* or any part thereof are taken out of the *Consultant's* hands under GC 9.1(b), the *Departmental Representative* will provide notice to the *Consultant*, and may require such failure of performance or progress to be corrected. If within fourteen (14) days after receipt of notice the default is not corrected or corrective action is not initiated to correct such fault, Canada may, by notice, without limiting any other right or remedy, take all or any part of the *Services* out of the *Consultant's* hands.
4. If the *Services* or any part thereof have been taken out of the *Consultant's* hands, the *Consultant* will be liable for, and upon demand pay to *Canada*, an amount equal to all loss and damage suffered by *Canada* by reason of the non-completion of the *Services* by the *Consultant*.
5. If the *Consultant* fails to pay on demand for the loss or damage as a result of GC 9.4, *Canada* will be entitled to deduct and withhold the same from any payments due and payable to the *Consultant*.
6. If the *Services* or any part thereof are taken out of the *Consultant's* hands as a result of GC 9.1(b) and GC 9.3, the amount referred to in GC 9.5 shall remain in the Consolidated Revenue Fund until an agreement is reached or a decision of a court or tribunal is rendered. At that time the amount, or any part of it, which may become payable to the *Consultant* shall be paid together with interest from the due date referred to in TP 2 of clause 9998DA, Terms of Payment, and in accordance with the terms of the Standing Offer.
7. The taking of the *Services*, or any part thereof, out of the *Consultant's* hands does not relieve or discharge the *Consultant* from any obligation under the Standing Offer, the Call-up, or imposed

upon the *Consultant* by law, in respect to the *Services* or any part thereof that the *Consultant* has performed.

#### **GC 10 Time and Cost Records to be Kept by the Consultant**

1. Time charged and the accuracy of the *Consultant's* time recording system may be verified by the *Departmental Representative* before or after payment is made to the *Consultant* under the terms and conditions of the Call up.
2. The *Consultant* shall keep accurate time and cost records and, if required for the purposes of the Standing Offer, shall make these documents available to the *Departmental Representative* who may make copies and take extracts therefrom.
3. The *Consultant* shall afford facilities for audit and inspection upon request and shall provide the *Departmental Representative* with such information as may be required from time to time with reference to the documents referred to in GC 10.2.
4. The *Consultant* shall, unless otherwise specified, keep the time sheets and cost records available for audit and inspection for a period of at least six (6) years following completion of the *Services*.
5. If the verification is done after payment by Canada, the *Consultant* agrees to repay any overpayment immediately upon demand.

#### **GC 11 National or Departmental Security**

1. If the *Departmental Representative* is of the opinion that the Project is of a class or kind that involves national or departmental security, the *Consultant* may be required:
  - (a) to provide any information concerning persons employed for purposes of the Standing Offer unless prohibited by law;
  - (b) to remove any person from the Project and its site if that person cannot meet the prescribed security requirements; and
  - (c) to retain the Project *Technical Documentation* while in the *Consultant's* possession in a manner specified by the *Departmental Representative*.
2. Notwithstanding the provisions of GC 12, if the Project is of a class or kind that involves national or departmental security, the *Consultant* shall not issue, disclose, discard or use the Project *Technical Documentation* on another project without the written consent of the *Departmental Representative*.

#### **GC 12 Rights to Intellectual Property**

1. Definitions

"Background" means all Technical Output that is not Foreground and that is proprietary to or the confidential information of the *Consultant*, the *Consultant's Sub-Consultants*, or any other entity engaged by the *Consultant* in the performance of the *Services*;

"Foreground" means any Invention first conceived, developed or reduced to practice as part of the *Services* and all other Technical Output conceived, developed, produced or implemented as part of the *Services*;

"IP Rights" means any intellectual property rights recognized by law, including any intellectual property right protected through legislation (such as that governing copyright, patents, industrial design, or integrated circuit topography) or arising from protection of information as a trade secret or as confidential information;

"Invention" means any new and useful art, process, machine, manufacture or composition of matter, or any new and useful improvement in any art, process, machine, manufacture or composition of matter, whether or not patentable and without limiting the foregoing the term includes any unique design and construction system;

"Technical Output" means: (i) all information of a scientific, technical, or artistic nature relating to the *Services*, whether oral or recorded in any form or medium and whether or not subject to copyright, including but not limited to any Inventions, designs, methods, reports, photographs, physical models, surveys, drawings, specifications developed for the purpose of the Project; as well as (ii) computer printouts, design notes, calculations, CADD (Computer-aided Design and Drafting) files, and other data, information and material, prepared, computed, drawn, or produced for the purpose of the Project; and (iii) operating and maintenance manuals prepared or collected for the Project; and (iv) any buildings, built works, structures and facilities constructed as, or as part of, the Project. Technical Output does not include data concerned with the administration of the Standing Offer and/or Call-Up by Canada or the Consultant, such as internal financial or management information, unless it is a deliverable under the terms of the Standing Offer and/or Call-Up.

## 2. Identification and Disclosure of Foreground

The *Consultant* shall:

- (a) promptly report and fully disclose to Canada all Foreground that could be Inventions, and shall report and fully disclose to Canada all other Foreground not later than the time of completion of the *Services* or such earlier time as Canada or the Standing Offer and/or Call-Up may require, and
- (b) for each disclosure referred to in (a), indicate the names of all *Sub-Consultants* at any tier, if any, in which IP Rights to any Foreground have vested or will vest.

Before and after final payment to the *Consultant*, Canada shall have the right to examine all records and supporting data of the *Consultant* which Canada reasonably decides is pertinent to the identification of the Foreground.

## 3. IP Rights Vest with *Consultant*

Subject to articles GC 12.10 and GC 12.11 and the provisions of GC 11 National or Departmental Security, and without affecting any IP Rights or interests therein that have come into being prior to the Standing Offer and/or Call-Up or that relate to information or data supplied by *Canada* for the purposes of the Standing Offer and/or Call-Up, all IP Rights in the Foreground shall immediately, as soon as they come into existence, vest in and remain the property of the *Consultant*.

## 4. Ownership Rights in Deliverables

Notwithstanding the *Consultant's* ownership of the IP Rights in the Foreground that is a prototype, built work, building, structure, facility, model or custom or customized system or equipment together with associated manuals and other operating and maintenance documents and tools, *Canada* shall have unrestricted ownership rights in those deliverables, including the right to make them available for public use, whether for a fee or otherwise, and the right to sell them.

5. Licence to Foreground

Without limiting any implied licences that may otherwise vest in *Canada*, and in consideration of *Canada's* contribution to the cost of development of the Foreground, the *Consultant* hereby grants to *Canada* a non-exclusive, perpetual, irrevocable, worldwide, fully-paid and royalty-free licence to exercise all IP Rights in the Foreground that vest in the *Consultant* pursuant to article GC 12.3, for the purpose of:

- (a) the construction or implementation of any building, built works, structures and facilities, contemplated by the Project;
- (b) the further development or alteration or evolution of any part of the constructed or implemented Project, including procurement of materials and components for this purpose;
- (c) the further development, modification (including additions or deletions), completion, translation, or implementation of the Foreground and any addition to it as *Canada* may require for the purposes of the completion, utilization and subsequent evolution of the Project;
- (d) the use, occupancy, operation, exploitation, maintenance, repair or restoration of the constructed or implemented or subsequently modified Project, including the procurement of replacement materials and components required for any such purpose; and
- (e) the publishing and transmission of reproductions of the Project or any part thereof in the form of paintings, drawings, engravings, photographs or cinematographic works, to the public, in hard copy or by any electronic or other means, except for copies in the nature of architectural drawings or plans.

6. Licence to Foreground for Other Projects

The *Consultant* hereby grants to *Canada* a non-exclusive, perpetual, world-wide, irrevocable licence to exercise all IP Rights that vest in the *Consultant* pursuant to paragraph GC 12.3 for the purpose of planning, designing and constructing or otherwise implementing any project other than the Project, and for any purpose set out in paragraph GC 12.5 as it relates to such other project. In the event that *Canada* exercises such IP Rights in another project, and provided that *Canada* does not already have equivalent rights under a previous contract or otherwise, *Canada* agrees to pay to the *Consultant* reasonable compensation determined in accordance with current industry practice and having regard to *Canada's* contribution to the cost of development of the Foreground. The *Consultant* shall ensure that in any sale, assignment, transfer or licence of any of the IP Rights that vest in the *Consultant* under the Standing Offer and/or Call-Up, the purchaser, assignee, transferee or licensee agrees to be bound by the terms of this provision and to accept reasonable compensation as is contemplated herein. The *Consultant* shall also ensure that any such purchaser, assignee, transferee or licensee of the IP Rights is required to impose the same obligations on any subsequent purchaser, transferee, assignee or licensee.

7. Licence to Background

Without limiting any implied licences that may otherwise vest in *Canada*, the *Consultant* hereby grants to *Canada* a non-exclusive, perpetual, irrevocable, worldwide, fully-paid and royalty-free licence to exercise such of the IP Rights in any Background incorporated into the *Services* or necessary for the performance of the *Services* as may be required

- (a) for the purposes contemplated in article GC 12.5 and GC 12.6;
- (b) for disclosure to any contractor engaged by *Canada*, or bidder for such a contract, to be used solely for a purpose set out in article GC 12.5 and GC 12.6;

and the *Consultant* agrees to make any such Background available to *Canada* upon request.

8. *Canada's* Right to Disclose and Sub-license

The *Consultant* acknowledges that *Canada* may wish to award contracts, which may include a competitive process, for any of the purposes contemplated in article GC 12.5, GC 12.6 and GC 12.7. The *Consultant* agrees that *Canada's* licence in relation to the IP Rights in the Foreground and in the Background, includes the right to disclose that Foreground and Background to bidders for such contracts, and to sub-license or otherwise authorize the use of that Foreground and Background by any contractor or consultant engaged by *Canada* for the purpose of carrying out such a contract.

9. *Consultant's* Right to Grant Licence

- (a) The *Consultant* represents and warrants that the *Consultant* has, or the *Consultant* shall obtain without delay, the right to grant to *Canada* the licence to exercise the IP Rights in the Foreground and the Background as required by the Standing Offer and/or Call-Up.
- (b) Where the IP Rights in any Background or Foreground are or will be owned by a *Sub-Consultant*, the *Consultant* shall either obtain a licence from that *Sub-Consultant* that permits compliance with articles GC 12.5, GC 12.6 and GC 12.7 or shall arrange for the *Sub-Consultant* to convey directly to *Canada* the same rights by execution of the form provided for that purpose by *Canada* no later than the time of disclosure to *Canada* of that Background and Foreground.

10. Trade Secrets and Confidential Information

The *Consultant* shall not use or incorporate any trade secrets or confidential information in any Foreground or Background used or created in performance of the Standing Offer and/or Call-Up.

11. *Canada* Supplied Information

- (a) Where performance of the *Services* involves the preparation of a compilation using information supplied by *Canada*, then the IP Rights that shall vest under paragraph GC 12.3 shall be restricted to the IP Rights in Foreground that are capable of being exploited without the use of the information supplied by *Canada*. All IP Rights in any compilation, the Foreground in which cannot be exploited without the use of such *Canada* supplied information shall vest in *Canada*. The *Consultant* agrees that the *Consultant* shall not use or disclose any *Canada* supplied information for any purpose other than completing the performance of the *Services*. The *Consultant* shall maintain the confidentiality of such information. Unless the Standing Offer and/or Call-Up otherwise expressly provides, the *Consultant* shall deliver to *Canada* all such information together with every copy, draft, working paper and note thereof that contains such information upon the completion or termination of the Standing Offer and/or Call-Up, or at such earlier time as *Canada* may require.
- (b) If the *Consultant* wishes to make use of any *Canada* supplied information that was supplied for purposes of the Standing Offer and/or Call-Up, for the commercial exploitation or further development of any of the Foreground, then the *Consultant* may

make a written request for a licence to exercise the required IP Rights in that *Canada* supplied information, to *Canada*. The *Consultant* shall give *Canada* an explanation as to why such a licence is required. Should *Canada* agree to grant such a licence, it shall be on terms and conditions to be negotiated between the parties including payment of compensation to *Canada*.

## 12. Transfer of IP Rights

- (a) If *Canada* takes the *Services* out of the *Consultant's* hands in accordance with GC 9 of the General Conditions, in whole or in part, or if the *Consultant* fails to disclose any Foreground in accordance with article GC 12.2, *Canada* may upon reasonable notice, require the *Consultant* to convey to *Canada* all of the IP Rights in the Foreground or in the case of a failure to disclose, all the IP Rights in the Foreground not provided. The IP Rights to be conveyed shall include the IP Rights in any Foreground that have vested or are to vest in a *Sub-Consultant*. In the case of IP Rights in Foreground which have been sold or assigned to a party other than a *Sub-Consultant*, the *Consultant* shall not be obligated to convey those IP Rights to *Canada*, but shall pay to *Canada* on demand an amount equal to the consideration which the *Consultant* received from the sale or assignment of the IP Rights in that Foreground or, in the case of a sale or assignment was not at arms length, the fair market value of the IP Rights in that Foreground, in each case including the value of future royalties or licence fees.
- (b) In the event of the issuance by *Canada* of a notice referred to in (a), the *Consultant* shall, at the *Consultant's* own expense and without delay, execute such conveyances or other documents relating to title to the IP Rights as *Canada* may require, and the *Consultant* shall, at *Canada's* expense, afford *Canada* all reasonable assistance in the preparation of applications and in the prosecution of any applications for, or any registration of, any IP Right in any jurisdiction, including without limitation the assistance of the inventor in the case of Inventions.
- (c) Until the *Consultant* completes the performance of the *Services* and discloses all of the Foreground in accordance with article GC 12.2, and subject to the provisions of GC 11 National or Departmental Security, the *Consultant* shall not, without the prior written permission of *Canada*, sell, assign or otherwise transfer title to the IP Rights in any of the Foreground, or license or otherwise authorize the use of the IP Rights in any of the Foreground by any person.
- (d) In any sale, assignment, transfer or licence of IP Rights in Foreground by the *Consultant* except a sale or licence for end use of a product based on Foreground, the *Consultant* shall impose on the other party all of its obligations to *Canada* in relation to the IP Rights in the Foreground and any restrictions set out in the Standing Offer and/or Call-Up on the use or disposition of the IP Rights in the Foreground (and, if applicable, the Foreground itself), including the obligation to impose the same obligations and restrictions on any subsequent transferee, assignee or licensee. The *Consultant* shall promptly notify *Canada* of the name, address and other pertinent information in regard to any transferee, assignee or licensee.

## GC 13 Conflict of Interest and Values and Ethics Codes for the Public Service

1. The *Consultant* declares that the *Consultant* has no pecuniary interest in the business of any third party that would cause, or seem to cause, a conflict of interest in carrying out the *Services*, and should such an interest be acquired during the life of the Standing Offer, the *Consultant* shall declare it immediately to the *Departmental Representative*.

2. The *Consultant* shall not have any tests or investigations carried out by any persons, firms, or corporations, that may have a direct or indirect financial interest in the results of those tests or investigations.
3. The *Consultant* shall not submit, either directly or indirectly, a bid for any Construction Contract related to the Project.
4. The Consultant acknowledges that no individuals who are subject to the provisions of the Conflict of Interest Act, 2006, c. 9, s.2, the Conflict of Interest Code for Members of the House of Commons, the Values and Ethics Code for the Public Services, or all other codes of values and ethics applicable within specific organizations cannot derive any direct benefit resulting from the Standing Offer or subsequent Call-ups.
5.
  - (a) The Consultant shall not be eligible to compete as a consultant or sub-consultant for a project which may result from the provision of the Services if the Consultant is involved in the development of a Project Brief or Terms of Reference, a Request for Proposal or similar documents for such project.
  - (b) The Consultant providing certain pre-design services (e.g. studies, analysis, schematic design) that do not involve the development of a Project Brief or Terms of Reference, a Request for Proposal or similar documents for such project may be eligible to compete as a consultant or sub-consultant for a project which may result from the provision of these services. The experience acquired by a Consultant who has only provided pre-design services, where the information / documentation resulting from these services is made available to other proponents, will not be considered by Canada as conferring an unfair advantage or creating a conflict of interest.

#### **GC 14 Status of Consultant**

The Consultant is an independent contractor engaged by Canada to perform the Services. Nothing in the Standing Offer through a Call-up is intended to create a partnership, a joint venture or an agency between Canada and the other party or parties. The Consultant must not represent itself as an agent or representative of Canada to anyone. Neither the Consultant nor any of its personnel is engaged as an employee or agent of Canada. The Consultant is responsible for all deductions and remittances required by law in relation to its employees.

#### **GC 15 Declaration by Consultant**

The *Consultant* declares that:

- (a) based on the information provided pertaining to the *Services* required under the Standing Offer, the *Consultant* has been provided sufficient information by the *Departmental Representative* to enable the *Services* required under the Standing Offer to proceed and is competent to perform the *Services* and has the necessary licences and qualifications including the knowledge, skill and ability to perform the *Services*; and
- (b) the quality of *Services* to be provided by the *Consultant* shall be consistent with generally accepted professional standards and principles.

#### **GC 16 Insurance Requirements**

1. General

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

## 2. Commercial General Liability

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

## 3. Professional Liability

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

## GC 17 Resolution of Disagreements

1. In the event of a disagreement regarding any aspect of the *Services* or any instructions given under the Standing Offer and subsequent Call-ups:
  - (a) The *Consultant* may give a notice of disagreement to the *Departmental Representative*. Such notice shall be promptly given and contain the particulars of the disagreement, any changes in time or amounts claimed, and reference to the relevant clauses of the Standing Offer and Call-up;
  - (b) The *Consultant* shall continue to perform the *Services* in accordance with the instructions of the *Departmental Representative*; and
  - (c) The *Consultant* and the *Departmental Representative* shall attempt to resolve the disagreement by negotiations conducted in good faith. The negotiations shall be

conducted, first, at the level of the *Consultant's* project representative and the *Departmental Representative* and, secondly and if necessary, at the level of a principal of the *Consultant* firm and a senior departmental manager.

2. The *Consultant's* continued performance of the *Services* in accordance with the instructions of the *Departmental Representative* shall not jeopardize the legal position of the *Consultant* in any disagreement.
3. If it was subsequently agreed or determined that the instructions given were in error or contrary to the Standing Offer or Call-up, *Canada* shall pay the *Consultant* those fees the *Consultant* shall have earned as a result of the change(s) in the *Services* provided, together with those reasonable disbursements arising from the change(s) and which have been authorized by the *Departmental Representative*.
4. The fees mentioned in GC 17.3 shall be calculated in accordance with the Terms of Payment set out in the Standing Offer and the relevant Call-up.
5. If the disagreement is not settled, the *Consultant* may make a request to the *Departmental Representative* for a written departmental decision and the *Departmental Representative* shall give notice of the departmental decision within fourteen (14) *days* of receiving the request, setting out the particulars of the response and any relevant clauses of the Standing Offer or Call-up.
6. Within fourteen (14) *days* of receipt of the written departmental decision, the *Consultant* shall notify the *Departmental Representative* if the *Consultant* accepts or rejects the decision.
7. If the *Consultant* rejects the departmental decision, the *Consultant*, by notice may refer the disagreement to *Mediation*.
8. If the disagreement is referred to *Mediation*, the *Mediation* shall be conducted with the assistance of a skilled and experienced mediator chosen by the *Consultant* from a list of mediators proposed by *Canada*, and departmental *Mediation* procedures shall be used unless the parties agree otherwise.
9. Negotiations conducted under the Standing Offer and any resulting Call-up, including those conducted during *Mediation*, shall be without prejudice.

#### **GC 18 Amendments**

The Standing Offer or any resulting Call-up may not be amended, or modified, nor shall any of its terms and conditions be waived, except by agreement in writing executed by the *Consultant* and the Contracting Authority.

#### **GC 19 Entire Agreement**

The Standing Offer and Call-up constitutes the entire and only agreement between the parties and supersedes all previous negotiations, communications and other agreements, whether written or oral, unless they are incorporated by reference in the Standing Offer and/or Call-up. There are no terms, covenants, representations, statements or conditions binding on the parties other than those contained in the Standing Offer and Call-up.

#### **GC 20 Contingency Fees**

The *Consultant* certifies that it has not, directly or indirectly, paid or agreed to pay and agrees that it will not, directly or indirectly, pay a contingency fee for the solicitation, negotiation or obtaining of the

Standing Offer to any person, other than an employee of the Consultant acting in the normal course of the employee's duties. In this section, "contingency fee" means any payment or other compensation that depends or is calculated based on a degree of success in soliciting, negotiating or obtaining the Standing Offer and "person" includes any individual who is required to file a return with the registrar pursuant to section 5 of the Lobbying Act, 1985, c. 44 (4th Supplement).

#### **GC 21 Harassment in the Workplace**

1. The Consultant acknowledges the responsibility of Canada to ensure, for its employees, a healthy work environment, free of harassment. A copy of the Treasury Board policy, the Policy on the Prevention and Resolution of Harassment in the Workplace, which is also applicable to the Consultant, is available on the Treasury Board Web site.
2. The Consultant must not, either as an individual, or as a corporate or unincorporated entity, through its employees or subconsultants, harass, abuse, threaten, discriminate against or intimidate any employee, consultant or other individual employed by, or under contract with Canada. The Consultant will be advised in writing of any complaint and will have the right to respond in writing. Upon receipt of the Consultant's response, the Contracting Authority will, at its entire discretion, determine if the complaint is founded and decide on any action to be taken.

#### **GC 22 Taxes**

1. Federal government departments and agencies are required to pay *Applicable Taxes*.
2. *Applicable Taxes* will be paid by Canada as provided in the invoice submission. *Applicable Taxes* must be specified on all invoices as a separate item along with corresponding registration numbers from the tax authorities. All items that are zero-rated, exempt or to which these *Applicable Taxes* do not apply must be identified as such on all invoices. It is the sole responsibility of the Consultant to charge *Applicable Taxes* at the correct rate in accordance with applicable legislation. The Consultant agrees to remit to appropriate tax authorities any amounts of *Applicable Taxes* paid or due.
3. The Consultant is not entitled to use Canada's exemptions from any tax, such as provincial sales taxes, unless otherwise specified by law. The Consultant must pay applicable provincial sales tax, ancillary taxes, and any commodity tax, on taxable goods or services used or consumed in the performance of the contract (in accordance with applicable legislation), including for material incorporated into real property.
4. In those cases where *Applicable Taxes*, customs duties, and excise taxes are included in the *Contract Price*, the *Contract Price* will be adjusted to reflect any increase, or decrease, of *Applicable Taxes*, customs duties, and excise taxes that will have occurred between bid submission and contract award. However, there will be no adjustment for any change to increase the *Contract Price* if public notice of the change was given before bid submission date in sufficient detail to have permitted the Consultant to calculate the effect of the change.
5. Tax Withholding of 15 Percent - Canada Revenue Agency

Pursuant to the Income Tax Act, 1985, c. 1 (5th Supp.) and the Income Tax Regulations, Canada must withhold 15 percent of the amount to be paid to the Consultant in respect of services provided in Canada if the Consultant is not a resident of Canada, unless the Consultant obtains a valid waiver from the Canada Revenue Agency. The amount withheld will be held on account for the Consultant in respect to any tax liability which may be owed to Canada.

#### **GC 23 Changes in the Consultant team**

1. Should an entity or person named in the Consultant's proposal as an entity or person who is to perform the *Services* or part of the *Services* be unable to perform or complete the *Services*, the *Consultant* shall obtain the concurrence of the *Departmental Representative* prior to performing or completing the *Services*, or entering into an agreement with another equally qualified entity or person to perform or complete the *Services*, such concurrence not to be unreasonably withheld.
2. In seeking to obtain the concurrence of the *Departmental Representative* referred to in paragraph 1, the *Consultant* shall provide notice in writing to the *Departmental Representative* containing:
  - (a) the reason for the inability of the entity or person to perform the *Services*;
  - (b) the name, qualifications and experience of the proposed replacement entity or person, and
  - (c) if applicable, proof that the entity or person has the required security clearance granted by *Canada*.
3. The *Consultant* shall not, in any event, allow performance of any part of the *Services* by unauthorized replacement entities or persons, and acceptance of a replacement entity or person by the *Departmental Representative* shall not relieve the *Consultant* from responsibility to perform the *Services*.
4. The *Departmental Representative*, with the authority of Canada, may order the removal from the *Consultant* team of any unauthorized replacement entity or person and the *Consultant* shall immediately remove the entity or person from the performance of the *Services* and shall, in accordance with paragraphs 1. and 2., secure a further replacement.
5. The fact that the *Departmental Representative* does not order the removal of a replacement entity or person from the performance of the *Services* shall not relieve the *Consultant* from the Consultant's responsibility to meet all the Consultant's obligations in the performance of the *Services*.

#### **GC 24 Joint and Several Liability**

If at any time there is more than one legal entity constituting the *Consultant*, their covenants under the Standing Offer and/or Call-Up shall be considered to be joint and several and apply to each and every entity. If the *Consultant* is or becomes a partnership or joint venture, each legal entity who is a member or becomes a member of the partnership or joint venture or its successors is and continues to be jointly and severally liable for the performance of the work and all the covenants of the *Consultant* pursuant to the Standing Offer and/or Call-Up, whether or not that entity ceases to be a member of the partnership, joint venture or its successor.

#### **GC 25 Not Applicable**

#### **GC 26 International Sanctions**

1. Persons in Canada, and Canadians outside of Canada, are bound by economic sanctions imposed by Canada. As a result, the Government of Canada cannot accept delivery of goods or services that originate, either directly or indirectly, from the countries or persons subject to [economic sanctions](http://www.international.gc.ca/sanctions/index.aspx?lang=eng) (<http://www.international.gc.ca/sanctions/index.aspx?lang=eng>).

2. The Consultant must not supply to the Government of Canada any goods or services which are subject to economic sanctions.
3. The Consultant must comply with changes to the regulations imposed during the period of the Call-Up. The Consultant must immediately advise Canada if it is unable to perform the Services as a result of the imposition of economic sanctions against a country or person or the addition of a good or service to the list of sanctioned goods or services. If the parties cannot agree on a work around plan, the Call-Up will be terminated for the convenience of Canada in accordance with terms and conditions of the Standing Offer and/or Call-Up.

#### **GC 27 Integrity Provisions - Standing Offer**

The Ineligibility and Suspension Policy (the "Policy") and all related Directives incorporated by reference into the Request for Standing Offers on its closing date are incorporated into, and form a binding part of the Standing Offer and any resulting contracts. The Consultant must comply with the provisions of the Policy and Directives, which can be found on Public Works and Government Services Canada's website at <http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>.

#### **GC 28 Code of Conduct for Procurement – Standing Offer**

The Consultant agrees to comply with the [Code of Conduct for Procurement](http://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/contexte-context-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/contexte-context-eng.html>) and to be bound by its terms for the period of the Standing Offer and any resulting contracts.

## **0000DA SUPPLEMENTARY CONDITIONS (SC)**

### **SC1 Language Requirements**

1. Communication between *Canada* and the *Consultant* shall be in the language of choice of the *Consultant* team, which shall be deemed to be the language of the *Consultant's* proposal.
2. The *Consultant's* *services* during construction tender call (such as addenda preparation, tenderers' briefing meetings, technical answers to questions by bidders, including translation of bidder's questions) shall be provided expeditiously in both languages, as necessary.
3. The *Consultant's* *services* during construction shall be provided in the language of choice of the *Contractor*. The successful *Contractor* will be asked to commit to one or other of Canada's official languages upon award of the *Construction Contract* and, thereafter construction and contract administration services will be conducted in the language chosen by the *Contractor*.
4. Other required services in both of Canada's official languages (such as construction documentation) are described in detail in the Standing Offer Brief.
5. The *Consultant* team, including the Prime *Consultant*, Sub-Consultants and Specialists Consultants shall ensure that the *services* being provided in either language shall be to a professional standard.

### **SC2 Federal Contractors Program for Employment Equity - Setting aside and Default by the Consultant**

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

## 9998DA TERMS OF PAYMENT (TP)

### TP 1 Fees

1. Subject to the terms and conditions of the Standing Offer, and in consideration for the performance of the *Services*, Canada shall pay to the Consultant a sum of money calculated in accordance with the fee arrangements identified herein and in 2000DA.
2. The *Consultant's* fees are only payable when the *Consultant* has performed the *Services* as determined by the *Departmental Representative*. Payment in respect of a *Service*, or part of a *Service*, is not to be deemed a waiver of *Canada's* rights of set-off at law or under this Standing Offer for costs or expenses arising from default or negligence of the *Consultant*.
3. The maximum amount payable under a Call-Up, including fees and disbursements, shall not be exceeded, without the prior written authorization of the Contracting Authority.

### TP 2 Payments to the Consultant

1. The *Consultant* shall be entitled to receive progress payments at monthly or other agreed intervals, subject to the limitations of the Call-up, if applicable. Such payments shall be made not later than the due date. The due date shall be the 30th day following receipt of an acceptable invoice.
2. An acceptable invoice shall be an invoice delivered to the *Departmental Representative* in the agreed format with sufficient detail and information to permit verification. The invoice shall also identify, as separate items:
  - (a) the amount of the progress payment being claimed for *Services* satisfactorily performed,
  - (b) the amount for any tax calculated in accordance with the applicable federal legislation, and
  - (c) the total amount which shall be the sum of the amounts referred to in TP 2.2(a) and TP 2.2(b).
3. The amount of the tax shown on the invoice shall be paid by *Canada* to the *Consultant* in addition to the amount of the progress payment for *Services* satisfactorily performed.
4. The *Departmental Representative* shall notify the *Consultant* within fifteen (15) *days* after the receipt of an invoice of any error or missing information therein. Payment shall be made not later than thirty (30) *days* after acceptance of the corrected invoice or the required information.
5. Upon completion of each Call-up, the *Consultant* shall provide a Statutory Declaration evidencing that all the *Consultant's* financial obligations for *Services* rendered to the *Consultant* or on the *Consultant's* account, in connection with the Call-up, have been satisfied.
6. Upon written notice by a *Sub-Consultant*, with whom the *Consultant* has a direct contract, of an alleged non payment to the *Sub-Consultant*, the *Departmental Representative* may provide the *Sub-Consultant* with a copy of the latest approved progress payment made to the *Consultant* for the *Services*.
7. Upon the satisfactory completion of all *Services*, the amount due, less any payments already made, shall be paid to the *Consultant* not later than thirty (30) *days* after receipt of an acceptable invoice, together with the Statutory Declaration in accordance with TP 2.5.

### TP 3 Delayed Payment

1. If *Canada* delays in making a payment that is due in accordance with TP 2, the *Consultant* will be entitled to receive interest on the amount that is overdue for the period of time as defined in TP 3.2 including the day previous to the date of payment. Such date of payment shall be deemed to be the date on the cheque given for payment of the overdue amount. An amount is overdue when it is unpaid on the first day following the due date described in TP 2.1.
2. Interest shall be paid automatically on all amounts that are not paid by the due date or fifteen (15) *days* after the *Consultant* has delivered a Statutory Declaration in accordance with TP 2.5 or TP 2.7, whichever is the later.
3. The rate of interest shall be the *Average Bank Rate* plus 3 percent per year on any amount which is overdue pursuant to TP 3.1.

### TP 4 Claims Against, and Obligations of, the Consultant

1. *Canada* may, in order to discharge lawful obligations of and satisfy lawful claims against the *Consultant* by a *Sub-Consultant*, with whom the *Consultant* has a direct contract, for *Services* rendered to, or on behalf of, the *Consultant*, pay an amount from money that is due and payable to the *Consultant* directly to the claimant *Sub-Consultant*.
2. For the purposes of TP 4.1 a claim shall be considered lawful when it is so determined:
  - (a) by a court of legal jurisdiction, or
  - (b) by an arbitrator duly appointed to arbitrate the said claim, or
  - (c) by a written notice delivered to the *Departmental Representative* and signed by the *Consultant* authorizing payment of the said claim or claims.
3. A payment made pursuant to TP 4.1 is, to the extent of the payment, a discharge of *Canada's* liability to the *Consultant* under a specific Call-up and will be deducted from any amount payable to the *Consultant* under any active Call-up.
4. TP 4.1 shall only apply to claims and obligations
  - (a) The notification of which has set forth the amount claimed to be owing and a full description of the *Services* or a part of the *Services* for which the claimant has not been paid. The notification must be received by the *Departmental Representative* in writing before the final payment is made to the *Consultant* and within one hundred twenty (120) *days* of the date on which the claimant
    - (1) should have been paid in full under the claimant's agreement with the *Consultant* where the claim is for an amount that was lawfully required to be held back from the claimant; or
    - (2) performed the last of the *Services* pursuant to the claimant's agreement with the *Consultant* where the claim is not for an amount referred to in TP 4.4(a)(1), and
  - (b) the proceedings to determine the right to payment of which shall have commenced within one year from the date that the notification referred to in TP 4.4(a) was received by the *Departmental Representative*.

5. *Canada* may, upon receipt of a notification of claim referred to in TP 4.4(a), withhold from any amount that is due and payable to the *Consultant* pursuant to a Call-up the full amount of the claim or any portion thereof.
6. The *Departmental Representative* shall notify the *Consultant* in writing of receipt of any notification of claim and of the intention of *Canada* to withhold funds pursuant to TP 4.5. The *Consultant* may, at any time thereafter and until payment is made to the claimant, post with *Canada*, security in a form acceptable to *Canada* in an amount equal to the value of the said claim. Upon receipt of such security *Canada* shall release to the *Consultant* any funds which would be otherwise payable to the *Consultant*, that were withheld pursuant to the provision of TP 4.5.
7. The *Consultant* shall discharge all lawful obligations and shall satisfy all lawful claims against the *Consultant* for *Services* rendered to, or on behalf of, the *Consultant* in respect of this Standing Offer at least as often as this Standing Offer requires *Canada* to discharge its obligations to the *Consultant*.

#### **TP 5 No Payment for Errors and Omissions**

The *Consultant* shall not be entitled to payment in respect of costs incurred by the *Consultant* in remedying errors and omissions in the *Services* that are attributable to the *Consultant*, the *Consultant's* employees, or persons for whom the *Consultant* had assumed responsibility in performing the *Services*.

#### **TP 6 Payment for Changes and Revisions**

1. Payment for any additional or reduced *Services* authorized by the Departmental Representative, prior to their performance, and for which a basis of payment has not been established at the time of execution of the Call-up, shall be in an amount or amounts to be determined by the Departmental Representative, acting reasonably, subject to these Terms of Payment.
2. Payment for additional *Services* not identified at the time of execution of the Call-up shall be made only to the extent that
  - (a) the additional *Services* are *Services* that are not included in stated *Services* in the Call-Up; and
  - (b) The additional *Services* are required for reasons beyond the control of the *Consultant*.

#### **TP 7 Extension of Time**

If, and to the extent that, the time for completion of the *Construction Contract* is exceeded or extended through no fault of the *Consultant* in the opinion of *Canada*, payment for the *Services* required for such extended period of the contract administration shall be subject to review and equitable adjustment by *Canada*.

#### **TP 8 Suspension Costs**

1. During a period of suspension of the *Services* pursuant to GC 7 of clause 0220DA, General Conditions, the *Consultant* shall minimize all costs and expenses relating to the *Services* that may occur during the suspension period.
2. Within fourteen (14) days of notice of such suspension, the *Consultant* shall submit to the *Departmental Representative* a schedule of costs and expenses, if any, that the *Consultant* expects to incur during the period of suspension, and for which the *Consultant* will request reimbursement.

3. Payment shall be made to the *Consultant* for those costs and expenses that, in the opinion of *Canada*, are substantiated as having been reasonably incurred during the suspension period.

#### **TP 9 Termination Costs**

1. In the event of termination of any Call-up pursuant to GC 8 of clause 0220DA, General Conditions, *Canada* shall pay, and the *Consultant* shall accept in full settlement, an amount based on these Terms of Payment, for *Services* satisfactorily performed and any reasonable costs and expenses incurred to terminate the Call-Up.
2. Within fourteen (14) *days* of notice of such termination, the *Consultant* shall submit to the *Departmental Representative* a schedule of costs and expenses reasonably incurred. The *Consultant* must ensure that it has mitigated its costs to the best of its ability.
3. Payment shall be made to the *Consultant* for those costs and expenses that in the opinion of *Canada* are substantiated as having been reasonably incurred after the date of termination.
4. The *Consultant* has no claim for damages, compensation, loss of profit, loss of opportunity, allowance or otherwise by reason of, or directly or indirectly arising out of, any action taken or termination notice given by *Canada* under GC8 Termination.

#### **TP 10 Disbursements**

1. Subject to any provisions specifically to the contrary in the Supplementary Conditions, the following costs shall be included in the fees required to deliver the consultant services and shall not be reimbursed separately;
  - (a) reproduction and delivery costs of drawings, CADD files, specifications and other Technical Documentation specified in the Standing Offer Brief;
  - (b) standard office expenses such as any photocopying, computer costs, Internet, cellular phone costs, long distance telephone and fax costs, including that between the *Consultant's* main office and branch offices or between the *Consultant's* offices and other team members offices;
  - (c) courier and delivery charges for deliverables specified in the Standing Offer Brief;
  - (d) plotting;
  - (e) presentation material;
  - (f) parking fees;
  - (g) taxi charges;
  - (h) travel time;
  - (i) travel expenses; and
  - (j) local project office.
2. Subject to any provisions specifically to the contrary in the Supplementary Conditions, the following disbursements reasonably incurred by the *Consultant*, that are related to the *Services*

and approved by the Departmental Representative, shall be reimbursed to the Consultant at actual cost:

- (a) reproduction and delivery costs of drawings, CADD files, specifications and other Technical Documentation additional to that specified in the Standing Offer Brief;
  - (b) transportation costs for material samples and models additional to that specified in the Standing Offer Brief;
  - (c) project related travel and accommodation additional to that specified in the Standing Offer Brief shall be reimbursed in accordance with current National Joint Council (NJC) Travel Directive (<http://www.njc-cnmc.gc.ca/directive/index.php?dlabel=travel-voyage&lang=eng&did=10&merge=2>); and
  - (d) other disbursements made with the prior approval and authorization of the Departmental Representative.
3. Disbursements shall be Project related and shall not include expenses that are related to the normal operation of the Consultant's business. The amounts payable, shall not exceed the amount entered in the Call-up, without the prior authorization of the Departmental Representative.

## **9999DA      CONSULTANT SERVICES (CS)**

### **CS 1    Services**

The *Consultant* shall perform the *Services* described herein and in any subsequent Call-up, in accordance with the terms and conditions of this Standing Offer.

### **CS 2    Standard of Care**

In performing the services, the Consultant shall provide and exercise the standard of care, skill and diligence required by customarily accepted professional practices and procedures developed by professional bodies in the performance of the services at the time when and the location in which the *Services* are provided.

### **CS 3    Time Schedule**

The *Consultant* shall:

- (a) submit in a timely manner to the *Departmental Representative*, for approval, a time schedule for the *Services* to be performed, in detail appropriate to the size and complexity of the Project, and in a format as requested by the *Departmental Representative*;
- (b) adhere to the approved time schedule and, if changes in the approved time schedule become necessary, indicate the extent of, and the reasons for such changes, and obtain the approval of the *Departmental Representative*.

### **CS 4    Project Information, Decisions, Acceptances, Approvals**

1. The *Departmental Representative* shall provide, in a timely manner, project information, written decisions and instructions, including acceptances and approvals relating to the *Services* provided by the *Consultant*.
2. No acceptance or approval by the *Departmental Representative*, whether expressed or implied, shall be deemed to relieve the *Consultant* of the professional or technical responsibility for the *Services* provided by the *Consultant*.

### **CS 5    Changes in Services**

The *Consultant* shall:

- (a) make changes in the *Services* to be provided for the Project, including changes which may increase or decrease the original scope of *Services*, when requested in writing by the *Departmental Representative*; and
- (b) prior to commencing such changes, advise the *Departmental Representative* of any known and anticipated effects of the changes on the *Construction Cost Estimate*, *Consultant fees*, *Project Schedule*, and other matters concerning the Project.

### **CS 6    Codes, By-Laws, Licences, Permits**

The *Consultant* shall comply with all statutes, codes, regulations and by-laws applicable to the design and where necessary, shall review the design with those public authorities having jurisdiction in order that the consents, approvals, licences and permits required for the project may be applied for and obtained.

#### **CS 7 Provision of Staff**

The *Consultant* shall, on request, submit to the *Departmental Representative* for approval, the names, addresses, qualifications, experience and proposed roles of all persons, including principals, to be employed by the *Consultant* to provide the *Services* identified in the Call-up and, on request, submit any subsequent changes to the *Departmental Representative* for approval.

#### **CS 8 Sub-Consultants**

1. The *Consultant* shall:
  - (a) prior to any Call-up notify the *Departmental Representative* of any other sub-consultants with whom the *Consultant* intends to enter into agreements for part of the *Services* and, on request, provide details of the terms, and *Services* to be performed under the said agreements and the qualifications and names of the personnel of the *Sub-Consultants* proposed to be employed on any Call-up;
  - (b) include in any agreements entered into with sub-consultants such provisions of this Standing Offer as they apply to the *Sub-Consultants'* responsibilities; and
  - (c) upon written notice by a *Sub-Consultant*, with whom the *Consultant* has a direct contract, inform the *Sub-Consultant* of the *Consultant's* obligations to the *Sub-Consultant* under this Standing Offer.
2. The *Departmental Representative* may object to any *Sub-Consultant* within six (6) days of receipt of notification given in accordance with CS 8.1(a) and, on notification of such objection, the *Consultant* shall not enter into the intended agreement with the *Sub-Consultant*.
3. Neither an agreement with a *Sub-Consultant* nor the *Departmental Representative's* consent to such an agreement by the *Consultant* shall be construed as relieving the *Consultant* from any obligation under this Standing Offer or subsequent Call-ups, or as imposing any liability upon *Canada*.

#### **CS 9 Cost Control**

If the *services* required under a call-up are for a construction project, the following will apply:

1. Throughout Project development, the *Construction Cost Estimate* prepared by the *Consultant* shall not exceed the *Construction Cost Limit*.
2. In the event that the *Consultant* considers that the *Construction Cost Estimate* will exceed the *Construction Cost Limit*, the *Consultant* shall notify the *Departmental Representative* and
  - (a) if the excess is due to factors under the control of, or reasonably foreseeable by the *Consultant*, the *Consultant* shall, if requested by the *Departmental Representative*, and at no additional cost to *Canada*, make such changes or revisions to the design as may be necessary to bring the *Construction Cost Estimate* within the *Construction Cost Limit*; or

- (b) if the excess is due to factors that are not under the control of the *Consultant*, changes or revisions may be requested by the *Departmental Representative*. Such changes or revisions shall be undertaken by the *Consultant* at *Canada's* expense, and the cost involved shall become an amount to be mutually agreed, prior to performance of the said changes or revisions.
3. If the lowest price obtained by bid process or negotiation exceeds the *Construction Cost Limit*, and if the excess is due to reasons within the control of, or reasonably foreseeable by the *Consultant*, the *Consultant* shall, if requested by the *Departmental Representative*, and without additional charge, be fully responsible for revising the Project scope and quality as required to reduce the construction cost and shall modify the construction documents as necessary to comply with the *Construction Cost Limit*.

## 2000DA CALCULATION OF FEES (CF)

### CF 1 Fee Arrangement(s) for Services

1. The fee to be paid to the *Consultant* for the *Services* pursuant to any Call-up, shall be determined by one or more of the following methods:
  - (a) Fixed Fee:  
The fixed fee will be established by multiplying the applicable hourly rate(s) by the number of hours, negotiated and agreed to by the *Departmental Representative* and the *Consultant*.
  - (b) Time Based Fee to an Upset Limit:  
An upset limit will be established by the *Departmental Representative*, and the *Consultant* will be paid for actual work performed using the applicable hourly rate(s) for such work.
2. Maximum Amount(s) Payable  
The maximum amount(s) that applies (apply) to the *Services* to be carried out at the fixed hourly rates shall be as specified in the Call-up, which amount(s) shall not be exceeded without the prior authorization of the *Departmental Representative* with the approval of Canada.

### CF 2 Payments for Services

1. Payments in respect of the fixed fee shall be made upon satisfactory performance of the *Services* but such payments shall not exceed the amount(s) as specified in the Call-up, for each *Service*.
2. Payments in respect of the time based fee arrangement shall be made upon satisfactory performance of the *Services* but such payments shall not exceed the amount(s) as specified in the Call-up, for each *Service*.
3. Progress payments, in respect of all fee arrangements, shall be made in accordance with TP 2 in clause 9998DA, Terms of Payment, of the Standing Offer, but such payments shall not exceed the value of the fee indicated for each *Service* under consideration.
4. If, for reasons attributable to the *Consultant*, a price cannot be obtained by a tender or negotiation within the *Construction Cost Limit*, or acceptable to the *Departmental Representative* for the award of the *Construction Contract*, the *Consultant* shall be entitled to receive payment for the tender call, bid evaluation and construction contract award *Services*, only when the requirements of CS 9.3, in clause 9999DA, Consultant Services and Departmental Responsibilities, have been met.

## **Building Condition Report (BCR level 2) Common Terms of Reference**

### **RS 1.0 Background Information to be reviewed**

#### **RS 1.1 Context including (Manual Process Using Word Files)**

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

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

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

Building Condition Reports provide the detailed technical information on which the Asset Management Plans are based. While the condition of the majority of PSPC assets has been assessed in the past, the data in the Building Condition Reports and subsequently, the Asset Management Plans, must be updated every 5 years to ensure their accuracy and to provide best support possible to managers making capital and repair investment decisions.

#### **RS 1.2 Automated Process Using New VFA Approach**

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

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

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

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

#### **RS 1.3 VFA Surveys**

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

departmental transition so the VFA actions will be refined throughout the duration of this established Standing Offer

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

Basic training on the use of VFA Surveys for Standing Offer Consultants, will be provided, by PSPC if and when required. However, it would be beneficial if the Consultants secure detailed knowledge of this software interface prior to the commencement of the contract services.

**Note \*\***

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

## **RS 2.0 General Requirements**

This Statement of Work describes the work required to complete a Building Condition Report. In general, a BCR is an assessment of the condition of the components and recommended actions required to maintain the asset in operating condition during the next 30 years. The BCR covers all components on the site and in the asset organized as follows:

- Site related components;
- Architectural related components/systems
- Heritage components/systems and Character Defining Elements (CDE) where applicable in designated buildings;
- Structural components/systems;
- Horizontal and vertical transportation;
- Mechanical components/systems, and;
- Electrical components/systems

The VFA software covers all systems on-site and in the asset organized as follows:

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

The objective of a level 2 Building Condition Report is to investigate various building and site improvement factors including:

- Component condition and assessment of remaining life,
- Condition of character defining elements for designated heritage buildings,
- Equipment obsolescence,
- Design problems and deficiencies that adversely affect operation and maintenance activities,
- Impact of compliance with Treasury Board Secretariat temperature, humidity and ventilation standards,
- Workstation density maximums imposed by design limitations,
- Compliance with the latest edition / revision of all applicable standards & codes (including, but not limited to: Health, Fire, Life Safety Codes, National Building Code, Electrical Safety Program

- Compliance with local by-laws,
- Effective age and remaining economic life of building components (Effective age must consider implications for a designated asset and Character Defining Elements in particular),
- Confirmation of regulatory testing,
- Functionality/Serviceability Assessment (stand alone task 1 – RS 7.1)
- Seismic screening/assessment, (stand alone task 2 – RS 7.2)
- Criticality assessments (stand Alone task 3 – RS 7.3)
- BCR Gap Analysis (stand alone task 4 – RS 7.4)
- FCI Scenario building and BMP cost/project projections (stand alone task 5 – RS 7.5)
- AMP reporting using appraisal information provided by PSPC (stand alone task 6 – RS 7.6)
- Accessibility Audits (stand alone task 7 – RS 7.7)
- Specialty Consulting work outside the specified list (stand alone task 8 – RS 7.8)

The statement of work, specific to a call-up against the standing offer, will detail the extent of work required and will indicate specific event considerations that the consultant/assessor will incorporate into the 30 year plan (E.g. heritage designation). The level of effort required could be as small as one of the “stand alone” task, up to and including investigations required for a particular BCR.

The intent of the level 2 BCR is to identify the events required to bring an asset to Class B (BOMA definition) level of accommodation and to maintain that level throughout a 30 year planning horizon. If an asset is at the Class A (BOMA definition) level of accommodation then the level to be maintained during the 30-year planning horizon is Class A (BOMA definition).

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

### **RS 2.1 Thirty year window of Capital and Repair requirements**

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

### **RS 2.2 Component/Systems List**

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

### **RS 2.3 Requirement Structure**

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

The requirement structure is:

- Integrity
  - Lifecycle - Systems that are approaching or have exceeded their useful life (e.g. a 25-year old chiller that is approaching the end of its useful life and is recommended to be replaced within the

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

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

### **RS 3.0 Component/System Related Requirements**

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

#### **RS 3.1 Validation of the Component/Systems List**

The VFA Survey for any asset contains a system list specific to its building and site improvements. To ensure the BCR will cover the entire asset, the first task in writing a BCR shall be to validate the existing system list. The existence of each system in the list shall be confirmed by visual confirmation at the building and site. Use the master system list in VFA Survey as a guide to establishing the granularity to which the building will be broken down. Systems in this list, but not found in the building shall be deleted.

Misclassifications (e.g. B1021 Flat Roof Construction instead of B1022 Pitched Roof Construction) shall be reclassified correctly. Systems in the building but missing from the building system list shall be added.

### **RS 3.2 Component/System Name**

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

### **RS 3.3 Component/System Details**

Associated with each component listed, there are several component details that shall be reviewed and updated as necessary. These details are:

- Expected life
- Component/System Cost (if a replacement event is included)
- Quantity (quantities associated to all the components/systems covered in the 30year horizon)
- Measurement units to use for the quantity field above
- Last Major Action Year

The definition and requirements for each field are listed below:

#### **RS3.3.1 Expected life span**

The expected life span of a component is an estimate of the number of years a component will last, from brand new, before it must be replaced or rehabilitated. See section 2.0 regarding Heritage designated buildings.

#### **RS3.3.2 Last Major Action Year**

The last major action year for a component is the last year the component was replaced or renovated to the point where its` expected life is now as long as if it were new. The consultant/assessor will update this field for each component in the asset as part of the BCR. If the last major action year is not known, then it shall be determined by subtracting the expected life for that component from the year the next replacement or renewal renovation is recommended. If the component has never been replaced, the consultant/assessor will use the year of construction as the last major action year for that component.

#### **RS 3.3.3 Measurement Units**

Select the appropriate measurement unit for the quantity number entered in the field above. Selections required by the costing tool are:

- Bhp           Boiler capacity is specified in Boiler Horse Power
- cool tons    Air Handling Unit cooling capacity is specified in cool tons
- ea            Number of units (e.g. doors, fixtures, etc.)
- flts           The number of flights of stairs in the building
- Hp            The total horsepower of the HVAC pumps
- level         The number of levels an escalator rises/drops
- ltr            Size of tanks in liters
- m             Length of a component in meters
- m2            Area of a component in square meters
- pt            Total number of sensing and control points in a control system
- seat          Total number of seats (e.g. bleachers)
- ea            The number of stops (floors) an elevator services
- sum          Total cost of the unit (e.g. traffic control system)

If the correct units are missing from the VFA data, make reference to the correct units in the Component/System description narrative field.

### **RS 3.3.4 Quantity (of the component/system)**

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

### **RS3.3.5 Component/System Cost**

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

## **RS 3.4 Component Narratives/System Descriptions**

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

### **RS 3.4.1 Component/System Description**

The description of the component or system should include:

- Component/System name
- Year installed
- Basic Description (i.e. description of wall assembly, window, roof type, make/model of equipment)
- The location of the component/system
- The quality of the component/system (excellent, good, average, fair, poor)
- The capacity or performance of the component/system
- The replacement cost
- Identification of Character Defining Elements

This information is to be recorded against the component or system and carried forward in the executive summary.

### **RS 3.4.2 Component/System Condition and Anticipated Replacement Date**

This narrative field should include:

- An assessment of the impact of each of the components deficiencies on the component's remaining life
- Quality and service conditions that will lengthen or shorten the component's expected life span, for example:
  - i. Below average quality component
  - ii. Inappropriate component or system design
  - iii. No longer supported by the supplier
  - iv. Inadequate maintenance
  - v. Inadequate performance
  - vi. Damage from external sources
- The rationale for component's condition rating (Excellent, Good, Average, Fair or Poor).
- The year the component/system was last replaced and establishment of the next replacement or rehabilitation date.
- An overview of the component's/system's condition and the recommendations/predictions for future repair and replacement projects. (Details of

particularly damaged components/systems should be provided in the format of the matrix below in section 3.6 which can be captured in VFA as a PDF file attachment with a reference flag within the event description narrative field)

### **RS 3.4.3 BCR Condition Narrative**

If, during the last Building Performance Review (BPR), one or more components were considered operationally unsatisfactory, the BPR team will have given each of those component an “unsatisfactory” status and filled in this narrative field describing the reason why. The consultant/assessor will review this narrative field for each “unsatisfactory” component and recommend and cost a course of action to rectify the problem described in the form of an event. Discussions with the Property Management team shall be held to ensure the consultant/assessor fully understands the problem described for each “unsatisfactory” component. Include conservation advice from conservation professionals for designated buildings.

### **RS 3.5 Component/System Inspection and the Component Evaluation Criteria List**

Each component in the AVS tool has a list of possible deficiencies associated with it. As part of the inspection process, the deficiency list for each component shall be reviewed and those deficiencies found to be present identified by a mouse click in the default box for each one. A note/narrative can be entered to further explain the deficiency.

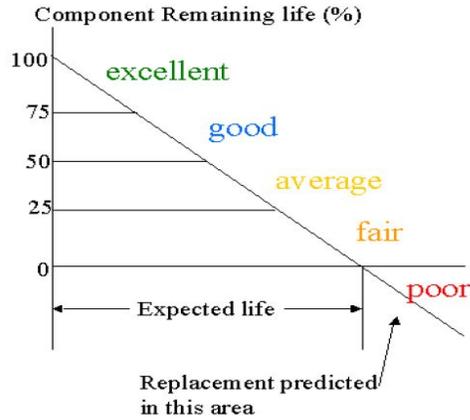
### **RS 3.6 Establishing Component/System Condition**

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

- Age of the component
- Character Defining Elements in Designated Buildings
- Component expected life
- Identified deficiencies
- The component service conditions including duty cycles, weather conditions, hours of operation.
- Maintenance practices
- Obsolescence
- Operational or functional performance problems

Then, as a result of the inspection process the condition of each component shall be determined as “excellent”, “good”, “average”, “fair” or “poor”. For purposes of consistency, each of these five possible conditions is related to the remaining life of a component divided by its expected or theoretical life expressed as a percentage. The following chart can illustrate how this works at a basic level.

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



condition).

**Note:** Even though the component's/system condition rating has been established as (Good, Fair, Poor). Certain Components/Systems require additional scrutiny to a **level 4** based on the industry standard Uniformat II – ASTM. The greater the matrix score the better the condition so use this additional scrutiny to re-confirm the system status before placing the narrative in the system status description.

Total Number of Score Available Per Component/System is 1 to 10 - Weight Factor Range is 1 to 15  
Maximum Total Weighted Points 1200

- Between 700 and 1200 Points = Good Condition
- Between 400 and 700 Points = Fair Condition
- Less than 400 Points = Poor Condition

	<u>Criteria</u>	<u>Description</u>	<u>Score</u>	<u>Weight Factor</u>	<u>Total Weighted Points</u>
1	% of Remaining economic life	Less than 25% of L/C = 10 Between 26% and 50% of L/C = 9 Between 51% and 75% of L/C = 7 Between 76% and 100 % of L/C = 4 Exceeded 100% of LC = 3 Exceeded 125 % of LC = 2 Exceeded 150% of LC = 1		3	
2	Equipment parts	Parts available = 10		4	

	obsolescence	Parts are becoming rare = 7 Parts can be custom made = 3 Parts not available = 1			
3	No longer supported by the supplier	Still supported by supplier = 10 Supplier support diminishing = 7 Alternate support available = 3 No Support = 1		4	
4	Design problems & deficiencies (DP&D)	No (DP&D) = 10 Minor (DP&D) = 7 Major (DP&D) = 3 (DP&D) cannot be fixed = 1		4	
5	Operational performance problems	No operational problems = 10 Minor operational problems = 7 Major operational problems = 3 Doesn't meet requirements = 1		5	
6	Functional performance problems	No functional problems = 10 Minor functional problems = 7 Major functional problems = 3 Doesn't meet requirements = 1		5	
7	Code Compliance	Code compliant = 10 Minor code problems = 7 Major code problems = 3 Immediate H/S code problems = 1		5	
8	Confirmation of regulatory testing,	Yes = 10 No = 1		6	

9	Maintenance practices	Reactive = 1 Scheduled PM = 5 Enhanced PM = 10		6	
10	Design problems and deficiencies that affect O&M activities	Yes = 1 Yes minor = 5 No = 10		4	
11	The component in service conditions	Low service conditions = 10 Medium service conditions = 7 High service conditions = 3 Extreme service conditions = 1		3	
12	State of repair or damage	Poor needs attention = 1 Poor = 3 Fair needs attention = 5 Fair = 7 Good = 9 Excellent = 10		10	
13	Aesthetic Appearance	Pleasing = 10 Not pleasing = 1		3	
14	Environmental (releases, GHG emissions, energy)	Low risk = 10 Med risk = 5 High risk = 1		3	
15	Demand Capacity	Yes met = 10 Pressured = 5		5	

		Not met = 1			
16	Industrial History of Unit	Yes history of Problems = 1 Average history of problems = 5 No history of problems = 10		10	
17	History of Leaks, Failures, shutdowns (events)	Yes = 1 No = 10		10	
18	More Reliable Technology Exists	Yes = 0 No = 10		2	
19	Provincial or Federal Policy Drivers	Yes = 1 No = 10		4	
20	Consultants Condition Judgment (Knowledge & Experience)	Overall condition poor = 1 Overall condition fair = 5 Overall condition good = 10		15	
				<b>TOTAL</b>	

### RS 3.6.1 Establishing Service Condition factors for all Components/systems.

- Once the component condition is established to suit the basic overview, the Consultant shall address additional specifics on the Component Conditions to be able to minimize the Risk to the Management and Operations of the Portfolio by the Owner Investor.

#### **Specifically evaluating assessed components of the building for Operational Criticality :**

Take the completed BCR Asset Tracker & reports of the building to create as follows:

- Focus on the Uniformat level 4 list of components for this exercise and review all the narratives and component/system conditions on the Asset Tracker spreadsheets.
  - Assess the condition of the building component/systems as determined under the category of “Event / Requirement Listings”, then indicate the component’s/system’s remaining life. There are hundreds of sub-components that affect the Criticality status of the building so ensure to group the categories to suit the “ASTM Uniformat II classification for Building Elements” . Establish the sub-elements as per the ASTM Standard and NISD standard structures.

2. Review the “Priorities”, and “action required” timelines in the Narratives as well as all the available supporting studies provided by the Asset in the format of a Criticality assessment as described below.
3. Provide each line to represent each of the required components to be assessed. Additional sub-categories may be deemed necessary as the process begins.

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
<b>Uniformat Level 4 – Required Component review headings.</b>															
Uniformat identification number															

**Create the summary chart for inclusion in the final criticality assessment report.**

2. Provide from left to right 15 columns each representing 1 year of the 15 year life cycle span.
3. Where each row (system component) intersects a year we will insert a value which represents the systems/ component condition.(The condition value will comprise two factors)
4. These factors applied together consider health and safety/continuity of operation/ asset threat and regulatory compliance.
5. Good condition (score 5)
6. Low risk of failure (score 4)
7. Medium risk – but near end of life – less than 5 years remaining (score 3)
8. Critical condition – high risk of failure (score 2)
9. System failed (score 1)
10. Produce a heat map broken down into three distinct horizons (i.e. **1-5 years, 6-10 years, 11-15 years**) per high level system where each distinct horizon will be colour coded to the reflect the following as applicable:
  - .1 **Black** = Already failed and needs immediate action
  - .2 **Red** = Imminent Timeline Failure
  - .3 **Yellow** = Deferred Intermediate Timeline Failure
  - .4 **Green** = Deferred Long-Term Timeline Failure
11. Once this chart is generated, the conditions as colour coded need to be rated in terms of criticality within the component category. This determines the true criticality relative to the overall Asset condition. Multiply the rating factor on the chart by the specific condition rating described below to get a new criticality value.
12. The final criticality assessment value provides for the highest criticality of renewals and condition of the building elements. The heat map will now have a change in colour coding for the building systems on the 15 year planning horizon where **0 to 30 points are in red** for the highest criticality of renewal, **31 to 70 points in yellow** for medium, and **71 to 100 points in green** for low.
13. The scoring of the major component categories will comprise of 4 scoring categories at a maximum of 25 points each under the four factors listed above. **Health and safety, Continuity of operation, Asset threat and Regulatory compliance.**

14. (4 x 25points = 100 points maximum).

<b>Health and Safety (Criterion 4 – Health &amp; Safety)</b>	
<b>Description</b>	<b>Condition Rating</b>
No exposure to hazards or injuries.	5
No exposure to hazards under normal operation.	4
Minor exposure to hazards and/or non-disabling injury.	3
Significant exposure to hazards and/or non-disabling injury.	2
Definite exposure to hazards capable of causing disabling injury or death. Immediate action required.	1

<b>Continuity of Operations (Criterion 2 – Strategy)</b>	
<b>Description</b>	<b>Condition Rating</b>
Failure of component/system can be corrected with minimal effect upon the users of the asset. Repairs can be undertaken without significant disruption to workspace during normal working hours.	5
Failure of the component/system can be corrected with minimal effect upon the users of the asset during normal working hours, however users may experience disruptive noise and activity in their general vicinity for an extended period.	4
Failure of the component/system cannot be corrected without evacuating a portion of the building for a brief period.	3
Failure of the component/system cannot be corrected without evacuating a portion of the building for an extended period.	2
Failure of the component/system cannot be corrected without evacuating the entire asset for an extended period.	1

<b>Threat to Asset (Criterion 2 – Strategy)</b>	
<b>Description</b>	<b>Condition Rating</b>
No exposure to hazards. Condition of the component/system has no relationship to the physical integrity of the asset.	5
Minor exposure to hazards under normal operations.	4
Some exposure to hazards. Failure of the component/system may have deleterious, localized effect on the physical integrity of the asset.	3
Major exposure to hazards.	2
Extreme exposure to hazards. Failure of the component/system has immediate and profound effect on the overall physical integrity of the asset.	1

<b>Regulatory Compliance (Criterion 2 – Strategy)</b>	
<b>Description</b>	<b>Condition Rating</b>
Component/system is fully compliant with current/fire codes and standards.	5
Component/system is partially compliant with applicable codes and standards.	4
Component/system has been identified as not compliant with applicable codes and standards.	3
Component/system is not compliant with applicable codes and standards, and has been identified as a life safety concern by authorities having jurisdiction.	2
Component/system is not compliant with applicable codes and standards, and authorities having jurisdiction have identified it as a major life safety threat. Immediate action is required.	1

The Consultants assigned to each Asset is already looking at the components and the rest of remaining life so there is an advantage to target a baseline of the findings to a common standard. This standard needs to be expressed by means of an FCI calculation for three of the six Criteria under the “National Capital Project Priority Ranking Policy”.

Based on a fiscally tight environment where the renewal needs are to be tiered according to levels of **Criticality**, the three Criteria of six identified in the National Capital Ranking Policy that directly impact Asset Planning Criticality are:

## **Criterion 2 – Strategy**

## **Criterion 3 – Timing**

## **Criterion 4 – Health & Safety**

Asset assessments in the NCA will focus on **Criterion 4 “Health and Safety”** which by default will also address **“Threat to the Asset and Continuity of Operations”**. The Life Cycle timeline in our Criticality (Stand Alone) assessment scope of work will give the timing within a 15 year window and allow for integrated planning strategy according to the Asset Tracker and Criticality Heat Map.

### **RS 3.7 Required Component/System Photographs**

A good photograph is worth a thousand words. To give a better understanding of the asset, the consultant/assessor will always include as many photographs (up to 10) as it takes to adequately describe the condition of the component being reviewed.

The Consultant shall provide at a minimum photographs of every component/system in the entire Asset. For Components/Systems with multiple types, one photograph is inadequate. E.g. One photo for an asset with stone and brick and other masonry cladding is not acceptable. Provide at least one photo for each type of cladding material which can be sub-categories to the Component/System.

These photograph files, as well as those specified elsewhere in this document, must be:

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

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

### **RS 4.0 Event Related Requirements**

Once the process of evaluating a component's condition has been completed, the recommended replacement or repair events shall be entered into the AVS application.

When generating a report in the VFA approach application, the user can check a box that will cause virtual events to be included in the report. Virtual cycling will automatically repeat all the repair/replacement events entered for one complete lifecycle for each component. The number entered into the component data field labeled “expected life” determines the component lifecycle. PWGSC has decided to make use of this feature. Therefore the consultant/assessor will only enter one lifecycle (expected life) worth of repair events and replacement events into the AVS tool.

### **RS 4.1 Event Details**

The event details listed below shall be validated and entered or updated in the AVS file for every new or existing event.

#### **RS 4.1.1 Brief Event Description**

This description is used in VFA reports and should therefore be as short and concise as possible, preferably no more than 40 characters. (e.g. replace roof, repair boiler, etc.)

### **RS 4.1.2 Event Narratives**

There are three event narratives associated with each event. Each of these narratives is listed below along with a description of the content required for each.

#### **Event Description**

The following information shall be included in every event description:

- A full description of what is to be done (include advice from conservation consultants and conservators as required for Character Defining Elements)
- The results expected from event implementation
- If the PSPC costing tool is not used to calculate component replacement events, describe why and provide costing breakdown.

#### **Event Justification and Strategy**

The following information shall be included in this narrative field:

- Any pertinent background information
- Rational for why the event is required.
- List of what deficiency(ies) the event correcting or enhancement is it providing.
- Indicate any potential for cost savings, increased performance, changes in function, reduction in energy consumption, greater code compliance, and increased accessibility.
- Identify Character Defining Elements of heritage designated buildings and seek advice from a heritage professional
- How the event should be carried out; steps required
- Indicate if it would be better to wait for a particular time of year?
- Will the tenants be disrupted?
- Describe the precautions that should be adhered to, to minimize impact on the tenant and building operations.
- List other events that should be grouped with this event and implemented together.

#### **Implication of Event Deferral (Risks)**

The answers to the following questions shall be included in this event narrative:

- What will be the impact on asset operations if the event is delayed?
- Will there be any additional degradation (cost) if the event is delayed?
- Does it involve a Character Defining Element(s)
- What is the potential impact of other components if the event is delayed?
- What is the impact on the tenants' health and working environment if the event is delayed?
- What is the impact on other related events/projects?

### **RS 4.1.3 Current Event Year**

The recommended year of event implementation shall be validated and provided in the report.

### **RS4.1.4 Estimated Event Cost**

In VFA, the replacement costs are automatically populated. However, the Consultant is expected to look at the condition ratings and remaining life to be able to adjust accordingly. Alternatively, the total estimated event cost at a class D accuracy, in current year dollars, shall be validated and provided as follows;

The budget estimations shall be developed using R.S. Means and the SOA Consultant's cost data experience with previous similar projects. If the project is deemed critical, the NCA reserves the right to have a Cost Consultant mandatory in the contract for third party verifications that are acceptable to the Crown. The budget provided shall include – at a minimum - demolition, mobilization, material, labour, soft costs such as engineering, project management and contingency as applicable to the event or project. The event budget breakdown percentages are

customized to scope of work of each event; however typical event budgets is in the Report should be in the range as follows:

Labour and materials – 60%

Contingency – 15%

Soft costs – 25%

It should be noted that the Current Replacement Value (CRV) and the event costs should be determined based on different approaches. The CRV for the building is the total amount of expenditure in current dollars required to replace the asset and meet the current acceptable standards of construction, and comply with regulatory requirements. The CRV at the component level is an approximate cost contribution at component or system level to the total CRV. The event costs are event scope specific and cannot be compared with the CRV. The renewal budget includes an inflation of two (2%) percent which is added per year from 2015 to 2043 which is based on the past ten (10) year historic average. The budget typically should not include applicable taxes.

## RS 4.2 Requirement Descriptions

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

The following information shall be included in every Requirement description:

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

### RS 4.2.1 Implication of Requirement Deferral

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

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

### RS 4.2.2 Closing a completed requirement

In VFA the assessor is to "Close" Requirements that are 100% complete. When reviewing an overdue/deferred Requirement, it is imperative that the assessor does not close it unless the issue has been 100% completed and resolved. In the case of overdue/deferred Requirements where the details are inaccurate, the assessor shall modify the details. Deleting an overdue/deferred Requirement and creating a new one skews FCI and related calculations

resulting in a false picture of asset condition. The assessor can split a requirement to show that 30% of the requirement has been completed thus leaving 70% open.

### **RS 4.3 Required Event Photographs**

In addition to the photographs required under section 3.7, a photo shall be included if:

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

## **RS 5.0 Asset Data Requirements as they relate to VFA**

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

### **RS 5.2 Asset Details**

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

#### **RS 5.2.2 Asset Photographs**

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

Refer to section 3.7 for photograph specifications.

#### **RS 5.2.3 Asset Narratives**

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

##### **RS 5.2.3.1 BCR Project Team and Documents**

Include the following information:

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

##### **RS 5.2.3.2 Building History**

Include the following information:

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

- Changes in the facility use and/or occupancy.
- Heritage status.

### **RS 5.2.3.3 BCR Executive Summary**

Include the following information:

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

### **RS 5.2.3.4 Design Parameters & Deficiencies – current & future**

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

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

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

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

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

See 5.2.16 Building Performance Review for instructions on how to process the information provided and what to add to this narrative field.

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

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

The parameters are:

Maximum floor loading;

- Maximum heating capacity;
- Maximum cooling capacity;
- Maximum electrical capacity;
- Elevator capacities;
- Washroom capacities;

- Emergency exit stairwell size.

### **RS 5.2.3.5 Overview of Architectural & Structure Condition**

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

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

### **RS 5.2.3.6 Overview Site Condition**

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

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

### **RS 5.2.3.7 Overview of Vertical & Horizontal Transportation Condition**

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

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

### **RS 5.2.3.8 Overview of Mechanical Systems Condition**

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

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

### **RS 5.2.3.9 Overview of Electrical Systems Condition**

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

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

### **RS 5.2.3.10 Compliance with Air Quality Targets**

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

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

### **RS 5.2.3.11 Regulatory Testing Confirmation**

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

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

### **RS 5.2.3.12 Compliance with Accessibility Standards**

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

- Preamble for accessibility in Federal Crown property – provided.
- Compliance levels as determined in the most recently completed accessibility audit.
- List of identified areas of non-compliance.
- List of any recorded exemptions.
- List of any upgrades to accessibility implemented since completion of the last audit.
- Recommendations for remedial action if necessary - create and enter events into the VFA Survey for each recommended corrective action.

The overview of the standard is to be preceded by a detailed review as described below to be entered in the Accessibility Audit template.

If included as part of the Standing Offer call-up, the consultant shall complete the Accessibility Audit template to be provided by the Departmental Representative, by comparing the current asset configuration against the requirements specified by the 2006 Treasury Board Accessibility Standard for Real Property policy available at the web site listed below.

#### **Accessibility Requirements of the Treasury Board Accessibility Standard for Real Property or subsequent editions**

<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12044&section=text>

**CAN CSA B651-95 Barrier Free Design or CAN CSA B651-04 Accessible Design for the Built Environment Standards (confirm with PSPC the technical standard that is to be referenced prior to commencement of the Building Condition Report).**

Once the template has been completed, the consultant shall enter the recommended Requirements against the relevant systems in the VFA Survey. The year event implementation is recommended and Class “C” cost estimates, including the soft costs as specified in the Requirement costing section shall be included. Other Requirement details and the two narrative fields shall be entered as previously

described. One additional Requirement detail indicating the policy year (1995, 2004 or 2012) driving the event may need to be entered by the assessor.

The completed template shall be delivered to PSPC in Microsoft Word 2000 or higher format.

### **RS 5.2.3.13 Overview of Seismic Screening**

Provide an overview of the seismic status, including:

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

#### **TOR Scope description for Seismic Screenings**

A seismic screening shall be carried out in accordance with NRC's "Manual for Screening of Buildings for Seismic Investigation". The screening shall include a site review, a review of available existing building drawings/reports and the submission of the completed NRC Seismic Screening Form. The form is to contain a photograph of the building, relevant sketch (es) and a completed comments section indicating notable observations and any qualifications used in determining the Structural Priority Index (SPI) score. Comments by consultants should not be limited by the space available on the form. It is recommended that a separate write-up describing relevant observations during the review be included. If, for the specific type of building, significant changes have been made in the seismic provisions of the new 2005 National Building Code of Canada, a brief paragraph describing the nature of the changes shall be included in the comments. A provincially registered professional engineer (structural) shall stamp the Seismic Screening Form with his seal.

#### **Context of Screening Results**

The SPI score indicates deviation by contributing seismic factors to current seismic construction practices. It is not a detailed assessment and does not identify the level of specific building vulnerabilities. NRC suggests SPI scores be used for evaluation and planning purposes on the following basis:

- less than 10: low priority for further evaluation;
- between 10 and 20: medium priority for further evaluation;
- between 20 and 30: high priority for further evaluation;
- higher than 30: can be considered an exceptional risk.

Note: It is understood that NRC's "Manual for Screening of Buildings for Seismic Investigation" was based on NBCC 1990. Should a new screening document based on NBCC 2005 become available, PSPC may require the screening to be carried out in accordance with both the NRC Manual and the new document.

#### **TOR Scope description for Detailed Seismic Assessment**

A detailed Seismic Assessment shall include:

1. A gathering and review of existing plans and other documentation on the building;
2. A review of the building's main structural resistance system and elements to both the applicable provincial code, and the NBCC 2015 seismic requirements;
3. Performing relevant on-site investigations and a condition survey of existing elements;
4. Involvement of a geotechnical engineer to address site classifications and foundation requirements;
5. A detailed structural analysis, in accordance to the applicable provincial code and the NBCC 2015, taking into account the proposed alterations and building occupancy;
6. Review of operational and functional systems (i.e. non-structural elements) as it relates to operational and life safety requirements. These include, but are not limited to building systems such as canopies over exit ways, partitions in corridors and stairwells, roof parapets, mechanical and electrical systems, ceilings, and cladding at access/egress locations.;
7. Submission of a seismic assessment report including an evaluation of the sufficiency of the main building structure expressed as a percentage of the applicable provincial code, and the NBCC 2015. The report is also to include an assessment of the non-structural elements identified in 6.

The bulk of the seismic assessment will be done by a structural engineer, but other disciplines (e.g. geotechnical/electrical/mechanical/elevator/architecture) may be required to help coordinate with discipline-specific issues as required. Documents such as NRC's "Guidelines for the Seismic Evaluation of Existing Buildings" and CSA-S832-2014 "Seismic Risk Reduction of Operational and Functional Components of Buildings" shall be considered as reference documents.

#### **Options assessment for seismic upgrades**

If the main building structure does not meet 60% of either the applicable provincial code (while it continues to be based on NBCC 1995), or of NBCC 2015 requirements for new construction, upgrade options and approaches are to be investigated, so as to upgrade the seismic resistance of the main structure to at least the 60% level, but preferably to the 100% level. The optimal level of upgrade shall be selected based on financial, functional, operational, security and client requirements. Incorporation of practical aspects of the building alteration is to be carefully considered. New and emerging technologies are also to be carefully considered. Upgrade options for non-structural items are also to be investigated. Options, cost estimates and recommended seismic upgrading approaches are to be documented.

Reference documents such as NRC's "Guideline for Seismic Upgrading Techniques of Building Structures" and the "CSA-S832-2014 Seismic Risk Reduction of Operational and Functional Components of Buildings" are considered as reference documents.

- Selection of an upgrade option (whether 60%, 100% or other level) will include consideration of the following, among others: Seismic performance level;
- Design, project management and construction costs;
- Constructability considerations;
- Client requirements;
- Operational requirements;
- Displacement of building occupants;
- Long-term flexibility requirements for the building;
- Architectural aspects of improvements;
- Heritage aspects.

Consideration of Seismic evaluation options will be documented in part by ensuring:

Renovation plans contain the seismic assessment report name, author and date.

Where seismic upgrade work is not required, the existing level of seismic resistance expressed as a percentage of the current NBCC requirements is to be described on the renovation plans.

Where seismic upgrading work is included, details of the seismic improvements including the level of seismic upgrade in relation to the current NBCC requirements, seismic design loads and design philosophy are to be described on the renovation plans.

### **RS 5.2.3.14 Overview of Environmental Issues**

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

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

### **RS 5.2.3.15 Overview of Project Grouping**

This will be defined in detail in each individual TOR as generated for the Asset to be evaluated.

### **RS 5.2.3.16 Code Compliance Summary**

Include the following information:

- Code compliance preamble - provided.
- Applicable code version in force at the time of: original construction, any subsequent addition(s)/alteration(s), and any major renovations.
- Applicable code version currently in force and the relevant building code data matrix information, including: building area, building height, storeys below grade, sprinklered, major occupancy(ies), subsidiary occupancy(ies), number of streets, construction type, required fire-resistance ratings, and fire alarm.
- Occupant loads, including: maximum potential occupant load based on occupancy type(s), and current occupant load.
- Adequacy of existing washroom fixtures to serve maximum potential occupant load.
- A listing of all identified code issues, including:
  - Code issues covered under individual Systems.
  - General (multi-system) code design issues not already covered under individual Systems.
  - Code issues identified in the code compliance paragraph of the latest version of the BPR (see 5.2.3.17).

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

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

### **RS 5.2.3.17 Building Performance Review**

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

A summary of the issues and recommendations shall be written in narrative field “Design Parameters & Deficiencies – current & future” (see 5.2.3.4).

## **RS 6.0 Survey Inspection Process**

### **RS 6.1 VFA Survey Reports**

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

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

### **RS 6.2 VFA Surveys**

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

### **RS 6.3 Interview with the Asset Management Team**

It is the responsibility of the assessor to schedule an interview with the asset management team at the beginning of every building inspection. This meeting will give the assessor an opportunity to validate the asset’s system list, confirm the existence of operational problems, collect information about projects that have been completed since the last BCR and schedule escorted access to the building for the BCR team. During the winter months, systems located outside the asset may not be accessible or visible due to a layer of snow. In these circumstances the assessor may use the condition assessment provided by the property management team to prepare a preliminary schedule of proposed requirements. As part of each call-up, the assessor will return to the asset when weather permits, and confirm the condition of all those systems whose condition could not be assessed during the original visit. The assessor will update the BCR with any changes required to reflect actual system condition. This process shall not delay the delivery of the first version of the BCR.

### **RS 6.4 Capital versus Repair**

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

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

Does the Requirement...

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

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

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

## **RS 6.5 Requirement Classification**

### **Requirement Structure**

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

The requirement structure is;

- **Integrity**
  - o Lifecycle  
Components or Systems that are approaching or have exceeded their useful life. (Examples: a 25-year old chiller that is approaching the end of its useful life and is

recommended to be replaced within the next 5 years; a 15 year old membrane roof that is prematurely aged and showing signs of wear and leaking)

- o Reliability  
Components or Systems that are not working as designed and/or cannot be depended upon, but have not yet exceeded their useful life. (Examples: a recently installed mechanical control that is not operating properly or functioning in an unpredictable manner. Breaches in the roof membrane or deteriorated window sealants).
- **Optimization**
  - o Abandoned  
Equipment or Facility Systems that have been abandoned in place. (Examples: old cooling tower abandoned on the roof; old oil storage tank abandoned in the basement)
  - o Capacity  
Problems with a System's ability to meet current demand. (Examples: heating equipment that cannot adequately cover its intended area)
  - o Energy  
Conditions that adversely affect energy use (Examples: single-pane windows, lack of pipe insulation).
  - o Maintenance  
Components or Systems that require routine maintenance (Examples: recalibration of thermostats, cleaning of ducts, cyclical painting, other aesthetic considerations)
  - o Mission  
Components or Systems that do not meet the critical standards of the organization, per the guidelines provided by the client. (Examples: the facility needs to be operational on a 24/7 basis...therefore redundancy/backup components need to be added, e.g. dual-fuel boilers; plant adaptation, e.g. required additions/alterations associated with the conversion of a classroom facility into a dormitory; client driven security vulnerabilities)
  - o Sustainability  
Improvements where components and/or Systems potentially have a sustainable opportunity (other than Energy based). (Examples: water conservation measures, use of building materials and resources based on sustainable procurement and with recycled/bio-based content, improvement of indoor environmental quality and considerations that reduce the impact of the building and its operations on the surrounding site.)
  - o Technological Improvements  
Conditions that need to be made modern to meet current tech standards. (Examples: pneumatic to DDC; non-energy based upgrades).
- **Regulatory**

- o Accessibility  
Conditions that violate accessibility guidelines, such as the Americans with Disabilities Act or Barrier-Free Design Standards. (Examples: non-accessible building entrances, plumbing fixtures, or door hardware)
  
- o Building Code  
Conditions that violate the client specified local and/or national Building codes (Examples: lack of backflow protection, insufficient ventilation, OSHA violations).
  
- o HazMat  
Regulatory issues associated with Asbestos, Lead, PCB, and other situations in which hazardous materials are known or suspected to be present in the Asset. (Examples: suspected asbestos pipe insulation or floor tiles)
  
- o Life Safety  
Conditions that pose an immediate danger to human life or safety. (Examples: blocked emergency egress, dead-end corridors, damaged and/or non-functional fire protection or emergency Systems).

**Required Services Building Condition Report (BCR level 2) Terms of Reference**

<b>RS #</b>	<b>FEE summary to be supported by the Level of effort and schedule.</b>		<input checked="" type="checkbox"/> (Serv) Indicates a consultant service requirement. <input checked="" type="checkbox"/> (Note) Indicates (noted) consultant service adjustment below. <b>N/A</b> indicates (not applicable) no consultant service requirement.	<b>Serv</b>	<b>See Note</b>
<b>RS 1.0</b>			<b>Background Information to be reviewed</b>	<input checked="" type="checkbox"/>	
			<b>Building Condition Report</b>	<input checked="" type="checkbox"/>	
<b>RS 1.1</b>		1.1	Manual Process Using Word Files	<input checked="" type="checkbox"/>	
<b>RS 1.2</b>		1.2	Automated Process Using VFA	<input checked="" type="checkbox"/>	
<b>RS 1.3</b>			<b>VFA Surveys</b>	<input checked="" type="checkbox"/>	
<b>RS 2.0</b>		<b>2.0</b>	<b>General Requirements</b>	<input checked="" type="checkbox"/>	
		2.1	Thirty-Year Window of Capital and Repair Requirements	<input checked="" type="checkbox"/>	
		2.2	Component/System list	<input checked="" type="checkbox"/>	
		2.3	Requirements Structure	<input checked="" type="checkbox"/>	
<b>RS 3.0</b>			<b>Component/System Related Requirements</b>	<input checked="" type="checkbox"/>	
<b>RS 3.1</b>		3.1	Validation of the Component/System List	<input checked="" type="checkbox"/>	
<b>RS 3.2</b>		3.2	Component/System Name	<input checked="" type="checkbox"/>	
<b>RS 3.3</b>		3.3	Component/System Details	<input checked="" type="checkbox"/>	
		3.3.1	• Expected Life Span	<input checked="" type="checkbox"/>	
		3.3.2	• Last major action year	<input checked="" type="checkbox"/>	

		3.3.3	• Measurement units	✓	
		3.3.4	• Quantity (of the Component/Systems)	✓	
		3.3.5	• Component/System narratives	✓	
<b>RS 3.4</b>		3.4	System Narratives	✓	
		3.4.1	• Component/System description	✓	
		3.4.2	• Component/System Condition & Anticipated replacement date	✓	
		3.4.3	• BCR Condition Narratives	✓	
<b>RS 3.5</b>		3.5	Component/System Inspection & Evaluation Criteria List	✓	
<b>RS 3.6</b>		3.6	Establishing Component/System Condition	✓	
		3.6.1	Establishing Service Condition factors for all Components/systems		
<b>RS 3.7</b>		3.7	Required Component/System Photographs	✓	
<b>RS 4.0</b>			<b>Event Related Requirements</b>	✓	
<b>RS 4.1</b>		4.1	Event Details	✓	
		4.1.1	• Brief Event Description	✓	
		4.1.2	• Event Narratives	✓	
		4.1.3	• Current Event Year	✓	
		4.1.4	• Estimated Event Cost	✓	
<b>RS 4.2</b>		4.2	Requirement Descriptions	✓	
		4.2.1	• Implication of Requirement Deferral	✓	
		4.2.2	• Closing a Completed Requirement	✓	
<b>RS 4.3</b>		4.3	Requirement Event Photographs	✓	
<b>RS 5.0</b>			<b>Asset Data Requirements as they relate to VFA</b>	✓	
<b>RS 5.2</b>		5.2	Asset Details	✓	

		5.2.2	Asset Photographs	✓	
		5.2.3	Asset Narratives	✓	
		5.2.3.1	• BCR Project Team and Documents	✓	
		5.2.3.2	• Building History	✓	
		5.2.3.3	• BCR Executive Summary	✓	
		5.2.3.4	• Design Params & Defs – current & future	✓	
		5.2.3.5	• Overview of Architectural & Structure Condition	✓	
		5.2.3.6	• Overview Site Condition	✓	
		5.2.3.7	• Overview of V & H Trans Cond	✓	
		5.2.3.8	• Overview of Mechanical Systems Condition	✓	
		5.2.3.9	• Overview of Electrical Systems Condition	✓	
		5.2.3.10	• Comp w Air Quality Targets	✓	
		5.2.3.11	• Regulatory Testing Confirmation	✓	
		5.2.3.12	• Compliance with Accessibility Standards	✓	
		5.2.3.13	• Overview of Seismic Screening	✓	
		5.2.3.14	• Overview of Environmental Issues	✓	
		5.2.3.15	• Overview of Project Grouping	✓	
		5.2.3.16	• Code Compliance Summary	✓	
		5.2.3.17	• Building Performance Review		
<b>RS 6.0</b>		6.0	<b>Survey Inspection Process</b>	✓	
		6.1	VFA Survey Reports	✓	
		6.2	VFA Surveys	✓	
		6.3	Interview with the Asset Management Team	✓	
		6.4	Capital versus Repair		
		6.5	Requirement Classification		

**RS 7 Additional Stand Alone assessments**

<b>RS 7.0</b>		7.0	Specialty Expert - Can be used to describe <u>only the RS 7.0 Services</u> in the Required Services depending on the Proponent's expertise.		
<b>RS 7.1</b>		7.1	Stand Alone Task 1 - Functionality and Serviceability Assessment		
<b>RS 7.2</b>		7.2	Stand Alone Task 2 – Seismic Analysis	✓	
<b>RS 7.3</b>		7.3	Stand Alone Task 3 – Criticality assessments	✓	
<b>RS 7.4</b>		7.4	Stand Alone Task 4 – Gap Analysis		
<b>RS 7.5</b>		7.5	Stand Alone Task 5 – FCI Scenario analysis – BMP cost projections	✓	
<b>RS 7.6</b>		7.6	Stand Alone Task 6 - AMP documentation reporting	✓	
<b>RS 7.7</b>		7.7	Stand Alone Task 7 – Accessibility Audit		
<b>RS 7.8</b>		7.8	Stand Alone Task 8 – Specialty Consulting work as per TOR		
<b>RS 7.9</b>		7.9	Stand Alone Task 9 – Building Capacity Assessment – Long Form		
		App. I	National Capital Ranking Policy framework	✓	
		App. II	AMP template for analysis	✓	
		App. III	Code Compliance Summary template	✓	
		App. IV	Accessibility Audit Template	✓	



**GRAND TOTAL FEES**

Excl. taxes + disbursements

**Scope definition and fee structure Template to be used for all proposal submissions.**

Sample of Matrix template for the fee submission of Building Condition Reports (BCR) as per the Standing Offer Section IV - Statement of Work. Standard level – 2 study.

## RS 7.0 Specialty Expert

A Specialist is to be classified to have expertise in 'exclusively' the following two areas (listed directly below) which will feed the RS categories as they relate to:

1. Expertise in assessing Plants and Industrial buildings that have steam boilers, chilled water production equipment, ancillary equipment and systems including the boiler feed water systems, steam distribution equipment within the plant, the chiller, the condenser cooling water systems and the distribution pumps plus associated electrical power, control, and other specialty systems as found.
2. Expertise in assessing Assets for the purpose of creating an Asset Management Plan (AMP). The AMP is a detailed business and economic plan that generally outlines and recommends a management strategy for the Asset. This comprehensive business plan is completed on all crown owned assets and is usually updated for the asset on the same five year cycle as the BCR. The AMP provides the Owner with the building data and intelligence to properly direct the asset to meet its investment objectives.

The AMP consultant must demonstrate the following qualifications.

- Business Degree from a recognized Canadian academic institution;
- Five or more years experience in performing investment analysis for commercial office space
- Two or more years experience in completing AMPs for PWGSC's NCA assets;
- A broad knowledge base and understanding of PWGSC's NCA Real Estate Portfolio
- Experience in using PWGSC's REFIT Investment analysis or other similar software programs;
- Full understanding of the PWGSC's Building Condition Report and its key function in the AMP process and a full understanding of the real estate market valuation process;
- Experience in completing business case studies on complex real property projects.

## RS 7.1 Stand Alone Task 1 – Functionality and Serviceability Assessment

This section describes the work that the consultant/assessor will perform as a specific Stand Alone document.

### **Functionality and Serviceability Assessment:**

PSPC has a requirement for the implementation of Functionality and Serviceability Assessments (FSA) for (the designated building). Functionality and Serviceability Assessments are evaluation tools used to assess a facility against performance requirements for a typical BOMA B Class Building. The tools are designed to measure how well the building performs in both operational and maintenance requirements (Functionality) and the buildings accommodation requirements (Serviceability). Upon contract award, the consultant shall develop a complete and comprehensive Functionality and Serviceability Assessment.

FSA's in PSPC are based on ASTM (American Society for Testing and Materials) Standards. In order to solve the challenge of having buildings perform at acceptable levels, PSPC elected to omit some of the ASTM Serviceability aspects, and add one for "Thermal Environment and Indoor Air".

In addition to the functional and serviceability requirements set by the ASTM standards, PSPC has reconfigured FSA's to include "Space Suitability" requirements, based on PSPC Fit-Up Standards – Office and Support Space Allocations. Real Property has elected to measure six of these "space suitability" requirements to serve as a snap shot for Fit-Up compliance.

The work shall be carried out based on the terms, conditions and requirements stipulated within the BCR Standing Offer, as adjusted by this Call-up Terms of Reference.

The objective of this assessment is to gauge the extent in which a building performs in both operational and maintenance requirements (Functionality) and the buildings accommodation requirements (Serviceability). FSA's are designed to capture information relating to how a facility is meeting the requirements of its building occupants. The preparation and completion of an FSA will raise the following types of questions:

- Are there amenities that would help attract and retain staff?
- Is the building serviced by public transit and adequate parking facilities for staff and visitors?
- How well can the building support its users, whether visitors, occupants or those who manage and maintain the building?
- Are the environmental conditions (heating, cooling, air ventilation, sound and light) adequate so as to not negatively impact occupants?
- Can one work without undue distractions such as glare or intrusive sounds?
- Are the power and communication services adequate and dependable?
- Is the security provided appropriate for a government organization?
- Can the building be easily maintained?
- Can goods required for the operation be easily delivered and stored?
- Can visitors easily locate the building, the main entrance and the government services located within?

When completing the FSA, the objective is to consider and answer these questions, analyze the results, identify and record any variations from the generic PSPC profile of requirements and recommend actions to be taken to resolve inefficiencies.

**The Functionality and Serviceability Assessment are to include & not limited to the following sections:**

- Asset Data
  - Asset details
  - Asset photographs
  - Functionality and Serviceability Executive Summary
  - Serviceability and Space Suitability Profile
- Facility Serviceability Data
  - Facility Serviceability Ratings (Assessment Criteria)
    - Aspects
    - Topics
    - Features
  - Rating Scales
  - Serviceability Aspects – Functional Assessment Narratives
- Space Suitability Data
  - Fit-Up Space Allocation (Assessment Criteria)
  - Space Description Narrative

## RS 7.2 Stand Alone Task 2 – Seismic Analysis

This section describes the work that the consultant/assessor will perform as a specific Stand Alone document.

### **Purpose & Objective of Seismic Analysis:**

- To determine the seismic resistance of the building structure in accordance with the requirements of the 2015 National Building Code of Canada and the PSPC Seismic Policy.
- To determine the seismic upgrade requirements for the Operational and Functional Components (OFCs) of the building as it relates to a Life Safety Performance Objective. Particular attention and priority shall be given to the requirements for unreinforced masonry (terracotta, block, brick) and OFCs located along main egress routes.

### **Required Work:**

The consultant is to perform the following tasks to determine the seismic resistance of the structural system:

- Collect and review existing documentation on the building's main structural resistance system and elements, the geology and the seismic hazard of the site.
- Perform on-site investigations and a condition survey of existing elements to confirm existing member sizes, connections and conditions;
- Review the proposed geotechnical services with PSPC and carry out geotechnical investigations and analyses required to support the assessment;
- As part of the geotechnical investigation determine the average shear wave velocity ( $V_{s30}$ ) in the 30metres of soil / bedrock underlying the building including soil / rock descriptions;
- Address all site, ground, and foundation requirements of NBC 2015;
- Address all requirements defined in Chapter 6 of the latest edition of the Canadian Foundation Engineering Manual;
- Calculate the seismic load requirement for both 60% and 100% force levels for new building construction in accordance with NBCC 2015. Ensure to take into account all current conditions, historical alterations and any modifications that are under way or for which plans are already finalized. Prior to initiating the 3-D Dynamic seismic analysis, the Consultant shall submit and present a Seismic Analysis Brief indicating their proposed assumptions/methodology to be used in the building model; these are to be supported from their review of the existing documents, best practice and professional experience.;
- Evaluate and review the Operational and Functional components (OFCs) (i.e. non-structural elements) as related to a Life Safety Performance Objective. These include, but are not limited, to building components such as canopies over exit ways, partitions in corridors and stairwells, roof parapets, mechanical and electrical systems, ceilings, and cladding at access/egress locations. Particular attention and priority shall be given to the requirements for unreinforced masonry (terracotta, block, brick) and OFCs located along main egress routes.
- Present the design base shear and overturning moment for both 60% and 100% force levels for new building construction in accordance with Clause 4.1.8 of the 2015 NBCC. Please provide these detailed calculation including parameters in the report and provide the computer model summary;
- Submit a seismic assessment report including an evaluation of the sufficiency of the main building structure expressed as a percentage of the current NBCC value. The report is also to include an assessment of the OFCs identified above;
- The seismic assessment shall be carried out by a professional engineer licensed in British Columbia/Yukon with demonstrated experience in seismic evaluation of buildings, and engaging

other disciplines (e.g. geotechnical/electrical/mechanical/elevator/architecture) as required to complete this assignment;

- Documents such as NRC's "Guidelines for the Seismic Evaluation of Existing Buildings", NRC'S "Guidelines for seismic upgrading Techniques of building structures", CSA S832.2014 " Seismic risk reduction of operational and Functional components (OFCs) of buildings", PSPCC's "Guideline on Seismic Evaluation and Upgrading of Non-Structural Building Components" and RPS policy on Seismic Resistance of PSPCC buildings shall be considered as reference documents;
- New and emerging technologies are also to be carefully considered;
- Identify a **minimum** of three options for upgrading the seismic resistance of the building in order to meet the requirements of the 2015 NBCC and of the RPS Policy on Seismic Resistance of PSPC Buildings, **for each of** 60% and 100% seismic force levels. Upgrade options for OFCs are also to be provided.
- Describe the pros and cons of each option, and identify a preferred option with rationale. Provide order of magnitude estimates (Class D) of engineering and construction costs associated with each option, considering all major disciplines including structural, architectural, mechanical and electrical.
- The following factors are to be considered in the evaluation of upgrade options:
  - Seismic performance level
  - Design, project management and construction costs
  - Constructability considerations
  - Client requirements
  - Operational requirements
  - Long-term flexibility requirements for the building
  - Architectural Impact
  - Heritage Impact
  - Alignment with the overall project implementation strategy
- Provide a high-level implementation strategy for the recommended upgrade option including phasing of work, and design and construction milestones.

Submit a seismic assessment report for review and comments at the following progress stages: 66%, 99% and Final. The Final Report shall be stamped by the lead Professional Engineer responsible for the seismic assessment. The final 3-D computer model of the structure shall be submitted to PSPC. A formal presentation of the final report shall be made to PSPC.

### **RS 7.3 Stand Alone Task 3 – Criticality Assessment**

This section describes the work that the consultant/assessor will perform as a specific Stand Alone document.

#### **Specifically evaluating assessed components of the building for Operational Criticality :**

Take the completed BCR Asset Tracker & reports of the building to create as follows:

- Focus on the Uniformat level 4 list of components for this exercise and review all the narratives and component/system conditions on the Asset Tracker spreadsheets.
  1. Assess the condition of the building component/systems as determined under the category of "Event / Requirement Listings", then indicate the component's/system's remaining life. There are hundreds of sub-components that affect the Criticality status of the building so ensure to group the categories to suit the "ASTM Uniformat II classification for Building Elements". Establish the sub-elements as per the ASTM Standard and NISD standard structures.

2. Review the “Priorities”, and “action required” timelines in the Narratives as well as all the available supporting studies provided by the Asset in the format of a Criticality assessment as described below.
  
3. Provide each line to represent each of the required components to be assessed. Additional sub-categories may be deemed necessary as the process begins.

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
<b>Uniformat Level 4 – Required Component review headings.</b>															
Uniformat identification number															

**Create the summary chart for inclusion in the final criticality assessment report.**

1. Provide from left to right 15 columns each representing 1 year of the 15 year life cycle span.
  2. Where each row (system component) intersects a year we will insert a value which represents the systems/ component condition.(The condition value will comprise two factors)
  3. These factors applied together consider health and safety/continuity of operation/ asset threat and regulatory compliance.
  4. Good condition (score 5)
  5. Low risk of failure (score 4)
  6. Medium risk – but near end of life – less than 5 years remaining (score 3)
  7. Critical condition – high risk of failure (score 2)
  8. System failed (score 1)
  9. Produce a heat map broken down into three distinct horizons (i.e. **1-5 years, 6-10 years, 11-15 years**) per high level system where each distinct horizon will be colour coded to reflect the following as applicable:
    - .1 **Black** = Already failed and needs immediate action
    - .2 **Red** = Imminent Timeline Failure
    - .3 **Yellow** = Deferred Intermediate Timeline Failure
    - .4 **Green** = Deferred Long-Term Timeline Failure
  10. Once this chart is generated, the conditions as colour coded need to be rated in terms of criticality within the component category. This determines the true criticality relative to the overall Asset condition. Multiply the rating factor on the chart by the specific condition rating described below to get a new criticality value.
  11. The final criticality assessment value provides for the highest criticality of renewals and condition of the building elements. The heat map will now have a change in colour coding for the building systems on the 15 year planning horizon where **0 to 30 points are in red** for the highest criticality of renewal, **31 to 70 points in yellow** for medium, and **71 to 100 points in green** for low.
  12. The scoring of the major component categories will comprise of 4 scoring categories at a maximum of 25 points each under the four factors listed above. **Health and safety, Continuity of operation, Asset threat and Regulatory compliance.**
- The building assessment breakdown points of review as described above are given a colour coding from green to yellow to **red** as follows:

1. The lower the component/condition rating coupled with a **RED** of the Criticality Assessment document; the worse the impact to Health and Safety.
2. **RED** with the scores in the 0 – 30 range are in the highest critical need of renewal.

Heat Map Colour Coding			
Description	Total Weighted Points	Colour	
Highest criticality of renewal	0-30	Red	
Median criticality of renewal	31-70	Yellow	
Low criticality of renewal	71-100	Green	

**Application of Condition Ratings:**

Each system/component subject to a requirement/event in the BCR is to be put through an additional set of condition ratings under the same four (4) scoring categories illustrating the impact to each category by virtue of pursuing the event. The four (4) scoring categories have a maximum of 25 points each under the headings; Health and safety, Continuity of operation, Asset threat and Regulatory compliance. **(4 x 25points = 100 points maximum).**

Health and Safety	
Description	Condition Rating
No exposure to hazards or injuries.	5
No exposure to hazards under normal operation.	4
Minor exposure to hazards and/or non-disabling injury.	3
Significant exposure to hazards and/or non-disabling injury.	2
Definite exposure to hazards capable of causing disabling injury or death. Immediate action required.	1

Continuity of Operations	
Description	Condition Rating
Failure of component/system can be corrected with minimal effect upon the users of the asset. Repairs can be undertaken without significant disruption to workspace during normal working hours.	5
Failure of the component/system can be corrected with minimal effect upon the users of the asset during normal working hours, however users may experience disruptive noise and activity in their general vicinity for an extended period.	4

Failure of the component/system cannot be corrected without evacuating a portion of the building for a brief period.	3
Failure of the component/system cannot be corrected without evacuating a portion of the building for an extended period.	2
Failure of the component/system cannot be corrected without evacuating the entire asset for an extended period.	1

<b>Threat to Asset</b>	
<b>Description</b>	<b>Condition Rating</b>
No exposure to hazards. Condition of the component/system has no relationship to the physical integrity of the asset.	5
Minor exposure to hazards under normal operations.	4
Some exposure to hazards. Failure of the component/system may have deleterious, localized effect on the physical integrity of the asset.	3
Major exposure to hazards.	2
Extreme exposure to hazards. Failure of the component/system has immediate and profound effect on the overall physical integrity of the asset.	1

<b>Regulatory Compliance</b>	
<b>Description</b>	<b>Condition Rating</b>
Component/system is fully compliant with current/fire codes and standards.	5
Component/system is partially compliant with applicable codes and standards.	4
Component/system has been identified as not compliant with applicable codes and standards.	3

Component/system is not compliant with applicable codes and standards, and has been identified as a life safety concern by authorities having jurisdiction.	2
Component/system is not compliant with applicable codes and standards, and authorities having jurisdiction have identified it as a major life safety threat. Immediate action is required.	1

**Application of Criticality Rating:**

Each system/component subject to a requirement/event in the BCR is to be put through a set of criticality ratings. The overall Criticality rating for each component is calculated in three (3) stages based on six (6) factors.

The points and colour codes are established using a 6-point weighted ranking system which includes the following factors comprehensively:

Item #	Criticality Rating Factor	Weightage
1	Average Remaining Life	25%
2	Annual System Condition Index (SCI) considering no funding scenario	20%
3	Relative Importance of the Component	20%
4	Event Deferral Risk	15%
5	Failure Consequential Damage Risk	20%
6	Code Compliance Status	Override items 1, 3, 4 & 5. Please see * below.

**The Criticality rating for each component is calculated in three (3) Stages:**

**Stage 1** - Assigning points for each component/event as shown in tables 1-5 below.

**Stage 2** - Assigning weightages to the points which were assigned in Stage 1.

**\*Code Compliance Status:**

In case the component is non-compliant with the applicable code and/or Authority Having Jurisdiction (AHJ) have provided a non-compliance notice or the component condition amount to an unsafe condition with risk to the safety, then the weighted points for all criticality rating factors except the SCI are reduced to 0 which flags the component in the "Alert" zone.

Stage 3 - Adding the weighted points for each component to obtain total points as shown in tables 1-5 below and heat map colour as shown in table 6 below.

**Criticality Rating Factor For Average Remaining Life, Stages 1 & 2 (Table 1):**

<b>Table 1 - Average remaining life (Weight 25%)</b>		
<b>Average remaining life</b>	<b>Points contribution, Stage 1</b>	<b>Weighted Points, Stage 2</b>
1	0	0
2	8	2
3	15	4
4	23	6
5	30	8
6	38	10
7	45	11
8	53	13
9	60	15
10	68	17
11	75	19
12	83	21
13	90	23
14	95	24
15	100	25

**Criticality Rating Factor for System Condition Index (SCI), Stages 1 & 2 (Table 2)**

<b>Table 2 – System condition index with no funding scenario (Weight 20%)</b>		
<b>Description</b>	<b>Points contribution, Stage 1</b>	<b>Weighted Points, Stage 2</b>
Component SCI > 30% (Critical)	0	0
Component SCI 10-30% (Poor)	25	5
Component SCI 5-10% (Fair)	50	10
Component SCI < 5% (Good)	100	20

**Criticality Rating Factor for Relative Importance of The Component, Stages 1 & 2 (Table 3):**

<b>Table 3 - Relative importance of the component (Weight 20%)</b>		
<b>Description</b>	<b>Points contribution</b>	
	<b>Stage 1</b>	<b>Stage 2</b>
A10 FOUNDATIONS – High	0	0
A20 BASEMENT CONSTRUCTION - High	0	0
B10 SUPERSTRUCTURE - High	0	0
B20 EXTERIOR CLOSURE - Medium	50	10
B30 ROOFING – Medium	50	10
C10 INTERIOR CONSTRUCTION - Low	100	20
C20 STAIRS – Low	100	20
C30 INTERIOR FINISHES - Low	100	20
D10 CONVEYING – Medium	50	10
D20 PLUMBING – Medium	50	10
D30 HVAC – Medium	50	10
D40 FIRE PROTECTION - High	0	0
D50 ELECTRICAL – Medium	50	10

**Criticality Rating Factor for Event Deferral Risk, Stages 1 & 2 (Table 4):**

<b>Table 4 - Event Deferral Risk (Weight 15%)</b>		
<b>Description</b>	<b>Points contribution</b>	
	<b>Stage 1</b>	<b>Stage 2</b>

Code compliance required due to alteration or change of use. Failure to correct an unsafe condition can cause accelerated deterioration, structural damage or integrity of the building.	0	0
Code compliance required due to alteration or change of use. Failure to correct an unsafe condition, can cause notable impact on the structural elements and integrity of the building.	50	8
Code compliance required due to alteration or change of use. Failure to correct an unsafe condition can cause minor impact on the structural elements and integrity of the building.	100	15

**Criticality Rating Factor for Consequential Damage Rating, Stages 1 & 2 (Table 5):**

<b>Table 5 - Failure Consequential Damage Rating (Weight 20%)</b>		
<b>Description</b>	<b>Points contribution</b>	
	<b>Stage 1</b>	<b>Stage 2</b>
Failure: Will result in high damage and remediation cost of the building (ex: leaks in foundations will damage interiors).	0	0
Failure: Will result in medium damage and remediation cost of the building (ex: Exterior doors deterioration will result in notable damage on the interior finishes).	50	10
Failure: Will result in low damage of the building (ex: deterioration of the ceiling finishes will result in minor damage on the interior finishes).	100	20

Finally the weighted points gathered under the criticality rating are applied to each component score as a factor which are translated to the original heat map categories as follows:

Table 6 – Heat Map Colour Coding			
Description	Total Weighted Points Stage 3		
Highest criticality of renewal	0-30	Red	
Median criticality of renewal	31-70	Yellow	
Low criticality of renewal	71-100	Green	

**Final Sample Criticality Assessment Summary Heat Map Based on Uniformat Level IV:**

Criticality Assessment - Summary Recommendation Heat Map																
Level 4 Group Elements	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	
B101000-001-01-Floor Construction - General	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
B101000-001-02-Floor Construction - General	55	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
B101000-001-03-Floor Construction - General	55	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
B101500-001-01-Exterior Fire Escapes	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
B102000-001-01-Roof Construction - General	55	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
B201000-001-01-Exterior Walls - General	59	57	55	10	10	10	10	10	10	10	10	10	10	10	10	
B202002-001-01-Windows - Aluminum	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	
B202002-001-02-Windows - Aluminum	82	80	78	76	75	73	71	69	67	65	10	10	10	10	10	
B302500-001-01-Roof Safety Anchors	82	80	78	76	75	73	71	69	67	65	10	10	10	10	10	
C100000-002-01-Interiors - General	83	81	79	77	75	73	71	69	67	65	38	38	38	38	38	
C201000-001-01-Stair Construction - General	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	
D202000-001-01-Domestic Water Distribution - General	82	80	78	76	75	73	71	69	67	65	28	28	28	28	28	
D202000-001-02-Domestic Water Distribution - General	80	78	76	75	73	71	69	67	65	38	38	38	38	38	38	
D202400-001-01-Domestic Hot Water Boilers	78	76	75	73	71	69	67	65	28	28	28	28	28	28	28	
D203000-001-01-Sanitary Waste - General	82	80	78	76	75	73	71	69	67	65	28	28	28	28	28	
D203000-001-02-Sanitary Waste - General	45	45	45	45	45	45	45	45	45	45	45	45	45	45	45	
D302000-001-01-Hot Water Boilers - General	28	28	28	28	28	28	28	28	28	28	28	28	28	28	28	
D302500-001-01-Heating and Cooling Circulation Pumps	28	28	28	28	28	28	28	28	28	28	28	28	28	28	28	
D303400-001-01-Package Air Conditioning (PAC) Units - General	67	65	28	28	28	28	28	28	28	28	28	28	28	28	28	
D303400-002-01-Package Air Conditioning (PAC) Units - General	67	65	28	28	28	28	28	28	28	28	28	28	28	28	28	
D303400-001-01-PAC - Rooftop	80	78	76	75	73	71	69	67	65	28	28	28	28	28	28	
D304100-001-01-Make-Up Air Units	67	65	28	28	28	28	28	28	28	28	28	28	28	28	28	
D304500-001-01-Exhaust Ventilation Distribution Systems - General	82	80	78	76	75	73	71	69	67	65	28	28	28	28	28	
D304500-001-01-Exhaust Fans	75	73	71	69	67	65	28	28	28	28	28	28	28	28	28	
D401000-001-01-Sprinklers - General	70	68	66	65	63	61	59	57	55	18	18	18	18	18	18	
D401000-001-02-Sprinklers - General	72	70	68	66	65	63	61	59	57	55	18	18	18	18	18	
D403000-001-01-Fire Protection Specialties - General	55	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
D403000-001-02-Fire Protection Specialties - General	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
D409500-001-01-Exhaust Hood & Duct Fire Protection	63	61	59	57	55	18	18	18	18	18	18	18	18	18	18	
D501000-001-01-Electrical Service & Distribution - General	65	65	65	65	65	65	65	65	65	65	65	65	65	65	65	
D501000-001-02-Electrical Service & Distribution - General	28	28	28	28	28	28	28	28	28	28	28	28	28	28	28	
D501200-001-01-Distribution Panels and Breakers	73	71	69	67	65	28	28	28	28	28	28	28	28	28	28	
D501200-001-02-Distribution Panels and Breakers	28	28	28	28	28	28	28	28	28	28	28	28	28	28	28	
D502000-001-01-Lighting And Branch Wiring - General	65	28	28	28	28	28	28	28	28	28	28	28	28	28	28	
D503700-001-01-Fire Detection & Alarm Systems - General	78	71	69	67	65	10	10	10	10	10	10	10	10	10	10	
D503700-001-02-Fire Detection & Alarm Systems - General	71	69	67	65	28	28	28	28	28	28	28	28	28	28	28	

## RS 7.4 Stand Alone Task 4 – Gap Analysis

- This section describes the work that the consultant/assessor will perform as a specific Stand Alone document.
- In general, a BCR is an assessment of the condition of the components and recommended actions required to maintain the asset in operating condition during a projected 30 years.
- ***The BCR covers all components on the site and in the asset organized as follows:***
  1. Site related components such as infrastructure and landscaping.
  2. Architectural components such as the building envelope and the interior fit-up.
  3. Structural components such as the foundations and the superstructure.
  4. Mechanical & Electrical components such as the HVAC and Power.
  5. Horizontal & Vertical Transportation components such as elevators, lifts and conveyors.
- ***Focus on the major components for this exercise and review the components conditions.***
- ***Assess the condition of the building component and decide on the component's remaining life. There are hundreds of sub-components within the 5 major categories above but focus on the Architectural, Mechanical& Electrical and the Structural disciplines with the Overall related summary recommendations.***
- The remaining life shall be determined by considering the following factors:
  1. Age of the component.
  2. Component expected life.
  3. Identified deficiencies.
  4. The component service conditions including duty cycles, weather conditions, hours of operation.
  5. Maintenance practices.
  6. Obsolescence.
  7. Operational or functional performance problems.

***Review the Event Narratives in the BCR and the supporting studies and provide a summary recommendation of the findings.***

## RS 7.5 Stand Alone Task 5 – FCI Scenario Analysis / BMP Projections

This section describes the work that the consultant/assessor will perform as a specific Stand Alone document.

### **Building Management Plan Projection Listings (5-year, 10-year):**

1. Develop priority rankings with respect to all events/requirements stemming from the BCR:

P1 = all events/requirements occurring within the same year during BCR production

P2 = all events/requirements occurring in the first year following BCR production

P3 = all events/requirements occurring in the second-fifth years following BCR production

P4 = all events/requirements occurring in the sixth-tenth years following BCR production

P5 = all events/requirements occurring from the eleventh year and on following BCR production

2. The below table summarizes the considerations around the priority rankings associated with each event:

<b>Priority 1 – Currently Critical (Immediate)</b>
Projects in this category require immediate action to:
1. Return a facility to normal operation
2. Stop accelerated deterioration
3. Correct a cited safety hazard
<b>Priority 2 – Potentially Critical (Year One)</b>
Projects in this category, if not corrected expeditiously, will become critical within a year.
Situations in this category include:
1. Intermittent interruptions
2. Rapid deterioration
3. Potential safety hazards
<b>Priority 3 – Necessary – Not Yet Critical (Year Two-Five)</b>
Projects in this category include conditions requiring appropriate attention to preclude predictable deterioration or the potential downtime and the associated damage or higher costs if deferred further.
<b>Priority 4 – Recommended (Year Six-Ten)</b>
Projects in this category include items that represent a sensible improvement to existing conditions. These items are not required for the most basic function of a facility; however, Priority 4 projects will either improve overall usability and/or reduce long term
<b>Priority 5 – Recommended (After Ten Years).</b>

### **Facility Condition Index (FCI) Scenarios:**

1. Compute the current replacement value of the facility. The Current Replacement Value (CRV) is defined as the total amount of expenditure in current dollars required to replace the asset and meet the current acceptable standards of construction and comply with regulatory requirements. CRV is not the Insurance Replacement Value, Book Value, or the Market Value.
2. Compute the Facility Condition Index for the entire building. The Facility Condition Index (FCI) is a comparative indicator of the relative condition of facilities. The FCI is expressed as a ratio of the cost of remedying maintenance deficiencies to the current replacement value. The FCI provides to the facility's owners/management a method of measurement to determine the relative condition index of a single building, group of buildings, or the total facility.

The FCI is the amount of deferred maintenance divided by the Current Replacement Value (CRV).

The results range from 0 to 1, or can be expressed as a percentage. The generally accepted range of FCI's for establishing a building's condition is shown below. This value has been adopted by American Associations, and a number of other national facilities groups. Accepted values are as per the following guidelines:

The lower the value of FCI, the better condition that a building is in. Current industry benchmarks indicate the following subjective condition ratings for facilities with various ranges of FCI:

- 0 - 5% FCI** Asset is in good Condition
- 5 - 10% FCI** Asset is in fair condition
- 10 – 30% FCI** Asset is in poor Condition
- 30 – 50% FCI** Asset is in critical Condition

### **FCI values and some examples of possible component issues**

#### **Critical (Over 30%)**

- Facilities will look worn with obvious deterioration.
- Equipment failure occurring frequently. Occasional building shut down will likely occur. Management risk is high.
- Health and safety issue figure prominently
- Replacement of multiple systems required (i.e. Mechanical, Electrical, Architectural and Structural
- Building heating system failure.
- Evacuation of select floor areas due to unaddressed roof leakage.
- Structural issues including envelope replacement.
- Operations Staff will not be able to provide regular scheduled maintenance due to high level of "reactive" calls

#### **Poor (11% to 30%)**

- Facilities will look worn with apparent and increasing deterioration
- Frequent component and equipment failure may occur. Occasional building shut down will occur
- Replacement of specific major systems required, such as heating and plumbing systems, complete interior renovations, building envelope restoration.
- Shut down may affect some units (i.e. roof or pipe leakage)
- Tenant complaints will be high with increased level of frequency.

- Concern about negative tenant morale will be raised and become evident.
- Facilities staff time will likely be diverted from regular scheduled maintenance and forced to “reactive” mode

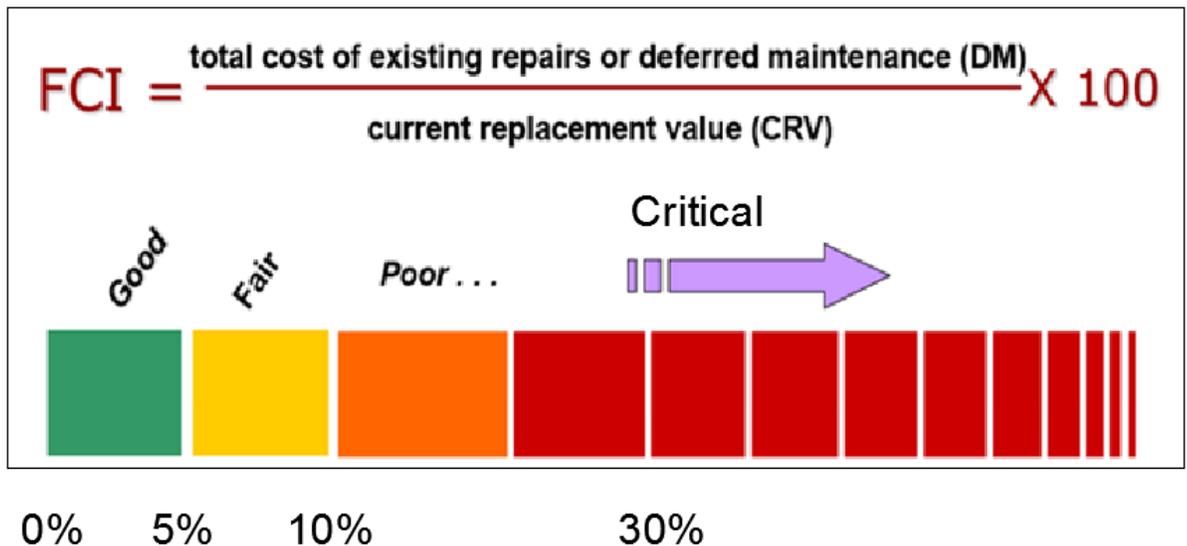
**Fair (6% to 10%)**

- Facilities are beginning to show signs of wear
- More frequent component and equipment failure will occur
- Repairs and replacement of specific systems, i.e. boiler, window replacements, interior renovations.
- Tenant complaints will occur with higher level of frequency
- Tenant morale may be affected
- Facilities staff time may at times be diverted from regular scheduled maintenance

**Good (0% to 5%)**

- Facilities will look clean and functional
- Limited and manageable component and equipment failure may occur
- Repairs and replacement of more of an aesthetic or general nature, such as wall painting, carpet replacement, roof repair, window caulking.
- Tenant complaints will be low and manageable
- Tenant morale will be positive and evident
- Facilities staff time will be devoted to regular scheduled maintenance

**FCI GRAPH:**



3. The FCI Scenario Analysis allows the Asset Management Team to evaluate various funding scenarios to tackle the renewal needs and determine the effect of the funding on the FCI at the same time.

**Type 1** also allows the Team to quickly evaluate the two funding scenarios while optimizing the funding allocation across the portfolio and maintain Assets in good shape within acceptable FCI limits.

Short Term Funding strategies shall include:

Scenario	Description
1	All renewals which are identified in the site inspection are completed in the following year from when they are prescribed to occur, and there are no previous backlog repairs for each year otherwise (e.g. if an event/requirement is slated to occur in 2016/2017, it does not get funded that year but gets funded in 2017/2018 and gets completed in this latter year).
2	Eliminate all critical priority 1 problems within 2 years. (Focus to be on operational, life safety and regulatory compliance for the Assets).

**Type 2** also allows the Team to take the time to evaluate as many funding scenarios as possible to work with a specific funding allocation across the portfolio and maintain Assets in good shape within acceptable FCI limits.

Long Term Funding strategies may include but not limited to:

Scenario	Description
1	Fixed amount of funding provided each year.
2	Fixed amount of funding plus a fixed percentage increase provided each year
3	Funding to maintain FCI
4	Eliminate backlog in 10 years
5	Funding a percentage of the CRV each year
6	Funding allocated by Asset Manager
7	Eliminate backlog each year.

## RS 7.6 Stand Alone Task 6 – AMP Specialty Consultant

This section describes the work that the consultant/assessor will perform as a specific Stand Alone document.

### **Purpose of the Project:**

The target deliverable after an extensive BCR is the creation of an Asset Management Plan (AMP) which will help to develop a direction for the Asset. The plan needs to take into account the condition of the building, how it meets federal government guidelines, as well as the value of the building, its Highest and Best Use, and its investment sustainability over a 25-year investment horizon. A series of options need to be identified for the Asset. These options need to be analysed and compared to a variety of benchmarks and guidelines to best determine the most appropriate strategy for the asset for the Owner Investor's consideration.

### **Required Work specific to the AMP:**

#### **Creation of a full scope AMP set of documents based on BCR component/system review of the Asset.**

The following pages detail the information and content requirements for completing the Asset Management Plan (The AMP).

#### **Executive Summary:**

The Executive Summary is a key section of the AMP. The intent of the summary is to provide a brief outline of the most significant information that flows from the option analysis, the BCR and the appraisal. Conclusions recommendations and actions should be clearly identified here.

##### **a. Content Requirements:**

The initial part of the executive summary should describe the asset's location, when it was built, floor area and the main use. It should also comment on the main findings and provide a summary from the sections of the AMP.

1. Describe the physical condition of the asset, identifying major issues.
2. Note the operational, functional and financial performance of the facility as well as any Heritage attributes, if any.
3. Identifying key issues pertaining to building performance and complete (**Table1**) **stating** major repair and capital spending required.
4. Identify and recommend the most urgent projects.
5. Summarize the Options Analysis for final recommendation and strategy. Include a Financial Analysis Table.
6. Conclude the Executive Summary with a signature block.

#### **1. Asset Description:**

Under this section the consultant is to provide a high level summary in a table format of the prominent facts regarding the asset.

**AMP SUMMARY**

**Building Name:**

**Building Address:**

<u>Occupancy Information</u>	<u>Building Information</u>
<b>Clients/Tenants (Federal):</b>	<b>Responsibility Centre:</b> <b>Type:</b> Crown Owned – PWGSC
<b>Clients/Tenants (Private):</b>	<b>No. of Buildings:</b>
<b>Management Responsibility:</b> PWGSC	<b>No. of Floors:</b>
<b>Land Information</b>	<b>Building Class:</b>
<b>Asset Type:</b> Outline whether the asset is used for office or special purpose accommodation.	<b>Heritage / FHBRO Designation:</b> "Classified"
<b>Zoning:</b>	<b>Environmental Performance Designations – BOMA Best, LEED, etc.</b>
<b>Parking:</b> Type of parking spaces (heated underground and or surface parking). <b>See BCR</b>	<b>FCI</b>
<b>Legal Description:</b> Provide the legal description for the asset.	<b>Construction Date:</b>
<b>Parking Stalls:</b> Discuss the number of parking stall both underground and surface. <b>See BCR &amp; Appraisal</b>	<b>Major Renovation Dates:</b>
<b>Parking Requirements Under Zoning:</b> Market norms compared to actual spaces both underground and surface.- <b>Appraisal</b>	<b>Purchase Date:</b> N/A – Crown Construct
<b>Public Utilities and Services:</b> Brief outline of the various municipal services available to the property and if the property is connected to a centre heating and cooling plant utility. <b>See Appraisal &amp; BCR</b>	<b>Purchase Price:</b> N/A – Crown Construct
<b>Site Access:</b> Vehicular access from Wellington Street. The site is also well serviced by public transportation.	<b>Market Value (Stabilized Occupancy):</b>
<b>Land Area:</b> <b>Appraisal &amp; Win Fin documents</b>	<b>Vacant Building Market Value:</b> <b>See Appraisal</b>
<b>Maximum Permitted Building Area:</b> <b>Appraisal</b>	<b>Vacant Land Value:</b> Amount and Effective Date: <b>See Appraisal</b>
	<b>Payment in Lieu of Taxes:</b> <b>See Appraisal</b>
	<b>Floor Area (m2):</b> <b>See Win Fin Data files</b>
	<ul style="list-style-type: none"><li>• Useable area</li><li>• Rentable area</li><li>• Gross area</li></ul>
	<b>Occupancy:</b>
	<ul style="list-style-type: none"><li>• <b>Federal/Other:</b> Percent Occupancy</li></ul>

**Square Meters per FTE Population:**

**Legal Land Use:** Description of current use and compliance to legal use. **Appraisal**

**Space Optimization:**

**2. Asset Condition:**

In this section, identify key findings concerning the physical condition of the asset (briefly summarized from the Building Condition Report).

**3. Operational Performance:**

Note the facility's level of Code Compliance and Standards in areas such as health and safety, accessibility, environmental standards and energy efficiency. Include in some detail the more important operational performance measures.

**4. Functional Performance:**

This section refers to the ability of a facility to satisfy the program delivery requirements of its clients. Note client satisfaction, accommodation functionally and space utilization.

**5. Market Analysis:**

The Market Valuation (Appraisal) is one of the key financial components in the overall Asset Management Plan development. The appraisal/valuation process is based on a comprehensive analysis of the building's functional and financial performance ranging from its highest and best use to its potential to generate income to its ability to compete in the local market. The appraisal analysis is a major input to the AMP option analysis and is used by PWGSC as one of the leading documents that drive the business decisions for the asset. The appraisal analysis is completed independent of the AMP itself and will be made available upon its completion.

The purpose of the section is to capture the valuation data and market information pertaining to the asset. The following appraisal sections should be briefly summarized and incorporated into the AMP document.

**a. Content:**

**1. Local Market Context:**

- Include the demographic information, economic prospects of relevance to the asset, description of surrounding area.

**2. Market Survey:**

- Note Market demand in public and private sectors.

### **3. Asset Valuation:**

- Define the Highest and Best Use, the Market value based on current condition.
- The Replacement Cost of the building to determine the Facility Condition Index (FCI).
- A vacant land value estimate.
- The improvement's replacement cost new, effective age, remaining economic life, and the depreciated replacement cost.

### **6. Financial Performance:**

Describe in this section the financial performance of the asset based on its current use functional performance and overall building design. The focus here is on cost performance.

### **7. Option Analysis:**

In this section of the report the consultant is to examine the full range of options available for the asset and to recommend an approach for the building that is realistic, and allows program requirements to be met in an effective and least-cost manner. Appendix "D"

### **8. Summary and Recommendations:**

The consultant is to provide the AMP Summary as a standalone document. This document is to briefly summarize the most important findings and recommendations from the AMP, Appraisal and the BCR exercises.

#### **Appendices:**

The AMP report is to provide the detailed information needed to support the analysis and conclusions of the main sections of the AMP. The use of appendices for detailed information allows the main document to be shorter and more user friendly.

#### **Content:**

- Site Plan, Floor Plans and/or Picture of Facility
- 25-Year Program of Work
- Financial Analysis
- Options Analysis- (all spreadsheets outlining the analysis of the options are to be included as part of the AMP Report).
- National Investment Strategy
- Federal Heritage Buildings Designation / Classification

**AMP SUMMARY**

**Building Name:**

**Building Address:**

<u>Occupancy Information</u>	<u>Building Information</u>
<b>Clients/Tenants (Federal):</b>	<b>Responsibility Centre:</b> Type: Crown Owned – PWGSC
<b>Clients/Tenants (Private):</b>	<b>No. of Buildings:</b>
<b>Management Responsibility:</b> PWGSC	<b>No. of Floors:</b>
<b>Land Information</b>	<b>Building Class:</b>
<b>Asset Type:</b> Outline whether the asset is used for office or special purpose accommodation.	<b>Heritage / FHBRO Designation:</b> "Classified"
<b>Zoning:</b>	<b>Environmental Performance Designations – BOMA Best, LEED, etc.</b>
<b>Parking:</b> Type of parking spaces (heated underground and or surface parking). <b>See BCR</b>	<b>FCI</b>
<b>Legal Description:</b> Provide the legal description for the asset.	<b>Construction Date:</b>
	<b>Major Renovation Dates:</b>
	<b>Purchase Date:</b> N/A – Crown Construct
	<b>Purchase Price:</b> N/A – Crown Construct
	<b>Market Value (Stabilized Occupancy):</b>
<b>Parking Stalls:</b> Discuss the number of parking stall both underground and surface. <b>See BCR &amp; Appraisal</b>	<b>Vacant Building Market Value: See Appraisal</b>
<b>Parking Requirements Under Zoning:</b> Market norms compared to actual spaces both underground and surface.- <b>Appraisal</b>	<b>Vacant Land Value:</b> Amount and Effective Date: <b>See Appraisal</b>
<b>Public Utilities and Services:</b> Brief outline of the various municipal services available to the property and if the property is connected to a centre heating and cooling plant utility. <b>See Appraisal &amp; BCR</b>	<b>Payment in Lieu of Taxes: See Appraisal</b>
<b>Site Access:</b> Vehicular access from Wellington Street. The site is also well serviced by public transportation.	<b>Floor Area (m2): See Win Fin Data files</b>
<b>Land Area: Appraisal &amp; Win Fin documents</b>	<ul style="list-style-type: none"><li>• Useable area</li><li>• Rentable area</li><li>• Gross area</li></ul>
<b>Maximum Permitted Building Area: Appraisal</b>	<b>Occupancy:</b>
	<ul style="list-style-type: none"><li>• <b>Federal/Other:</b> Percent Occupancy</li></ul>
	<b>Square Meters per FTE Population:</b>

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### Space Optimization:

**Legal Land Use:** Description of current use and compliance to legal use. **Appraisal**

## RS 7.7 Stand Alone Task 7 – Accessibility Audits

This section describes the work that the consultant/assessor will perform as a specific Stand Alone document.

### Accessibility Audit:

PSPC has a requirement for the implementation of accessibility audit for (the designated building). Upon contract award, the consultant shall develop a complete and comprehensive accessibility audit.

The work shall be carried out based on the terms, conditions and requirements stipulated within the BCR Standing Offer, as adjusted by this Call-up Terms of Reference. The final reports for this building shall act to reasonably identify any remaining accessibility improvements required in order to bring the base building elements of the facility in compliance with the Accessibility Requirements of the Treasury Board Accessibility Standard for Real Property and the CAN CSA B651 95 Barrier-Free Design Standard.

As part of the assessment, the Consultant shall obtain relevant asset information by attending the initial meetings planned with the Project Manager, Operational staff, P&TS Centre of Expertise specialists and other PWGSC stakeholders to provide relevant input.

### **The Accessibility Audit Reports are to include & not limited to the following sections:**

- Introduction
- Facility Overview
- Walkways
- Parking
- Building Entrances
- Vertical Movement
- Interior Doors and Corridors (Base Building)
- Washrooms
- Drinking Fountains
- Public Telephones/Tactile Signage
- Public Areas
- Building Exemptions
- Accessibility Compliance Score
- Class C Construction Estimates

The assessment of each building components must address the modifications required to comply with CAN CSA B651 95 Barrier-Free Design Standard and incremental modifications required to comply with CAN CSA B651 04 Accessible Design for the Built Environment.

## **RS 7.8 Stand Alone Task 8 – Specialty Consulting Work as per TOR**

### **Stated Objectives for a Hazard Industrial Building such as a Plant**

It is imperative that electrical & mechanical equipment/components situated within a typical central heating and cooling plant (CHCP) building be the highlighted focus of the report, in addition to the base building information. The objective of this BCR process is to develop a condition report that covers the heating & cooling plant as a whole functioning unit/asset and not just the building. This BCR report has an extensive requirement for a comprehensive, clear and detailed review of the plant electrical & mechanical summaries shall be presented as primary importance to the other discipline summaries.

The main building is a vessel/enclosure within which the plant operations and equipment function will have a separate maintenance protocol and Standard Operating Procedure (SOP). The building assessment shall be addressed with the BCR process as described in the BCR-Standing Offer with Asset Tracker data to be able to maintain the Asset in operating condition compliant with all regulatory and policy requirements during the next 30 years. This first portion of the BCR document shall cover all components on the site organized as follows:

- Site related components;
- Architectural related components/systems
- Structural components/systems;
- Horizontal and vertical transportation;

The following provide additional scope to the line items found under PR 1.4.6 *TOR Matrix for the Preparation of Building Condition Reports*:

#### **PR 1.5.1 (Validation of the Component List)**

1. In addition to the components provided in the standard VFA listing and the previous BCR, the consultant is to establish the full component list by extraction from the Standard Operating Procedures (SOPs) for the plant in consultation with the plant operations staff.

#### **PR 1.7.3.3 (BCR Executive Summary)**

1. With regard to the executive summary, it is imperative that CHCP electrical & mechanical equipment/components situated within the building be included within this section, in addition to the base building information. The objective of this BCR project is to develop a condition report that covers the heating & cooling plant as a whole functioning unit/asset and not just the building. This report has an extensive requirement for a comprehensive, clear and detailed executive summary, thus special attention to this section is a must. It is recommended that it be started by presenting the total estimated repair and capital costs at the beginning. Also it is recommended that the plant electrical & mechanical summaries be presented in advance of other discipline summaries.

#### **PR 1.7.3.8 (Overview of Mechanical Systems Condition):**

1. With regard to an overview of the condition of the mechanical systems, this shall cover base building, and all of the major plant equipment/components situated within the building. The objective of this project is to develop a condition report that covers the heating & cooling plant as a whole functioning unit/asset. The scope includes, but not limited to, the following; Air Compressors, Main Air Receivers, Control Air Dryers, Compressed Air Distribution, Centrifugal Chillers, Refrigerant Gas Leak Analyzer, Cooling Towers & Piping, Condenser Water Circulating Pumps, Chilled Water Circulating Pumps, Condensate return system and ancillary equipment, Central Heating Plant Boilers (Steam), Boiler Fans (Combustion Air), Breaching & Stacks, Boiler Combustion Gas Analyzer, Boiler Feed Water Make up & Expansion System, Chilled Water Make up & Expansion System, High Pressure Steam Distribution System, Chilled Water Distribution System Fuel Systems & Piping, Fuel Storage Tanks, Fuel Oil Pumps, Diesel Generator Systems, Water Treatment Systems, Automated Control Systems (DCS), Plumbing Systems.
2. Generally piping condition cannot be assessed beyond age based generalities. Possible piping considerations include (steam, condensate, hydroponic drip, chilled water primary, river water):
  - a. Having the consultant map of each piping system showing approximate age, diameter, length, insulation type etc. of each section (based on commentary from the plant superintendent and team, and supporting documentation); and
  - b. Recommended locations for testing (based on age or expected condition from above) and make any ensuing recommendations within the context of a future level III study.

#### **PR 1.7.3.9 (Overview of Electrical Systems Condition):**

1. With regard to an overview of electrical systems condition, this shall cover all of the major electrical equipment/components situated within the CHCP buildings and out buildings. The scope includes, but not limited to, the following:

Service, Power Vault, Primary Switch Gear, Secondary Switch Gear, Feeders, Metering Systems, Substations, Motor Control Centers, Large Electric Motor Starters, Bus ducts & raceways, Distribution Panels, Diesel Generator System, Normal & Emergency Lighting. In order to better explain the electrical systems with the CHCP. PSPC will provide single line electrical drawings.

## **RS 7.9 Stand Alone Task 9 – Building Capacity Assessment – Long Form**

This section describes the work that the consultant/assessor will perform as a specific Stand Alone document.

**The Building Capacity Assessment Report is to include the following sections:**

- Executive Summary
- Building Overview
- Exit Systems
- Vertical Transportation Systems

- Mechanical Systems
- Electrical Systems
- Sanitary Infrastructure
- Workplace 2.0

**Each section within each Building Capacity Assessment Report is to be developed as follows:**

- Executive Summary:
  - The building's current and maximum occupancy;
  - A summary table indicating the maximum occupancy supported by each of the major building systems (Exit Systems, Mechanical Systems, Electrical Systems and Sanitary Infrastructure) floor-by-floor in comparison to the building WP2 estimated occupancy as per the average WP2 (14m<sup>2</sup>); and
  - A conclusion stating whether the building is capable of meeting the occupant density prescribed in the estimated Workplace 2.0 standard and a summary of the limiting factors for increased occupant load floor-by-floor.
- Building Overview:
  - A brief summary of the building's physical infrastructure (e.g., number of floors, usage, etc.);
  - The building classification as per section 3.1.2.1 of the National Building Code (NBC);
  - Whether the high building requirements apply for any portion of the building as per section 3.2.6 of the NBC;
  - The Occupant Load of the building as per section 3.1.17.1 of the NBC; and
  - The Building Code Matrix as per the NBC.
- Exit Systems:
  - Provide an Exit Capacity Assessment, included, but not limited to the following:
    - Show on floor plans the exiting layout and the number and location of exits for each floor.
    - Analyze the existing exit system infrastructure in the building and confirm whether the infrastructure – including but not limited to the exit integrity, exit through lobbies, fire exposure protection, exit corridors, etc. – meet the requirements of the 2015 National Building Code of Canada (NBCC). Summarize findings in a table and provide the details of the analysis in an appendix.
    - Confirm that the distance between exits meet the requirements of the 2015 NBCC.
    - Confirm that each identified exit leads from the floor area it serves to an open public thoroughfare, or an exterior open space protected from fire exposure from the building and having access to an open public thoroughfare. Summarize findings in a table and provide the details of the analysis in an appendix.
    - Analyze travel distance from all floor areas to exits on each floor and determine if it meets the limits established in the 2015 NBCC. Summarize findings in a table and provide the details an appendix.

- Calculate and summarize in a table the results of the occupant load of each floor under the scenarios listed below. Provide all calculations for each scenario in the appendix, and ensure to identify, discuss and summarize any limiting factors for increased occupant load for each floor, such as sloped floors, stair rise/run, egress/exit door widths, etc.
  - Current/Existing state. Provide a table listing the current occupancy loads for each floor.
  - If floors are fitted up to the Workplace (WP) 2.0. Provide list of all assumptions used.
  - Maximum occupant load permitted by the 2015 NBCC. Clearly identify the density chosen (from Section 3.1.17.1. of the NBCC) and rationale for using that density.
  - Exit capacity of the building. Provide a table showing the measured dimensions of the exit (including stair clear width, stair rise and run; width of exit/egress door, etc.) for each floor and the resulting occupant capacity.
  - Provide a table listing the fire resistance rating of all exit stair doors.
- Conduct an Exiting analysis for all floors at the following densities: current occupant load, WP 2.0 load, maximum occupant load allowed by 2015 NBCC; and at exit capacity. Provide all calculation in an appendix, making sure to list/discuss all input parameters, assumptions, methodologies, etc. Summarize the results in a table and provide.
- Conduct a Time to Exit analysis, and ensure that the time includes time needed for occupant to reach an open public thoroughfare, or an exterior open space protected from fire exposure from the building and having access to an open public thoroughfare. List/discuss all input parameters, assumptions, methodologies, etc. Summarize the results in a table and provide all calculations in an appendix.
- Assess the requirements pertaining to high buildings and report on compliance of this asset. The deficiency that was noted was the lack of stairwell pressurization. The NBCC essentially requires that during a period of 2 hours after the start of a fire, each exit stair serving storeys below the lowest exit level will not contain more than 1% by volume of contaminated air from the fire floor. The analysis should compare the time required to evacuate the building vs the time that the stairwell would be contaminated by smoke (and hence no longer usable). If the evacuation time is lower than the time required to exceed the 1% by volume of contaminated air, then the existing condition is acceptable (i.e. no pressurization retrofits required).
- Vertical Transportation Systems:
  - Provide a Vertical Transportation Capacity Assessment, reviewing the existing installation to determine elevator quantity, speed, capacity and performance characteristics.
    - Provide a listing and budget cost to comply with full accessibility compliance to latest standards.
    - Set up an elevator simulation by computer model of the building. Input passenger density as observed, and provide a model of the performance of the

elevator system including predicted average waiting times. This is to be then compared to PSPC requirements. As required, please provide several iterations with different configurations and passenger loading.

- Relative to the requirements pertaining to high buildings, assess the requirements and report on compliance with respect to emergency operation of elevators and firefighter elevator.

- Mechanical Systems:

- An overview of the existing mechanical systems within the building, that includes some granular information about individual major pieces of equipment (e.g., central AHUs, chillers, etc.);
- The specific information sources used by the consultant for the evaluation (e.g., TAB reports, as-built drawings, shop drawings, building control systems, nameplate data, etc.);
- An evaluation that determines the maximum amount of outdoor air and cooling the building mechanical systems can provide. The evaluation is to be supported by building specific data;
- As based on the building's maximum outdoor air and cooling capacity, an evaluation that determines the maximum occupancy that can be supported. Consideration is to be given to building zoning and distribution, unique office spaces (e.g., data centres), latent and sensible heat gain, etc. Utilize the most recent version of the applicable standards and codes (e.g., ASHRAE 62.1-2013); and
- If a building's mechanical system capacity is unable to support the existing occupancy as per the applicable standards and code, detail where the shortfall exists (e.g., specific major pieces of equipment).

- Electrical Systems:

- An overview of the existing electrical systems within the facilities;
- Confirm the capacity of the Electrical Service supplying the facility and determine peak loading based on electricity usage records over the previous five years from the electricity supplier. Comment on the impact and cause of any upward or downward trends or shifts in usage;
- Determine the percentage loading and available capacity of the electrical service;
- Identify and indicate the ratings (kVA, amps, volts) of each primary transformer and where more than one primary transformer is present, estimate and tabulate the percentage draw from each of the transformers relative to the total load of the facility, based on existing occupancy, existing equipment, and available single line diagrams;
- Determine the capacity of the main secondary distribution (e.g., risers) that would be impacted by an increase in occupancy;
- Determine the maximum occupancy of each tower/block and for the entire facility based on the electrical systems. Include the electrical load of each FTE (e.g. work station power, task lighting, etc.) and the added mechanical loads to accommodate the FTEs; and
- Determine if the potential increase in FTEs will have any impact on other electrical systems such as lighting, network/communications, and emergency power.

- Sanitary Infrastructure:

- An overview of the existing sanitary infrastructure within the facilities, including the barrier free washrooms; and

- A table showing the total existing sanitary facilities per floor and an analysis of the maximum occupant load per floor based on the existing sanitary facilities using the 2015 NBCC. The analysis should define whether the calculation is for what occupancy and should show the calculations and the table used from the 2015 NBCC.
  - Compliance analysis of washroom facilities between the original NBCC that was applicable at time of construction and the 2015 NBCC.
  - Show (on floor plan) and discuss washroom locations, and determine the maximum travel distance to the washrooms.
  - Evaluate the adequacy of the sanitary infrastructure for the various densities, i.e. under Current/Existing state; WP 2.0; Maximum occupancy permitted by 2015 NBCC; and exit capacity. Show the details of the calculations, the reference table used from the 2015 NBCC, including any other references from codes and standards.
  - Identify the number of barrier free washrooms.
- Workplace 2.0:
  - An overview of the building's existing occupancy per floor and for the facility as a whole (e.g., number of occupants);
  - An overview of the building's occupancy per floor calculated using Workplace 2.0 average value (14m<sup>2</sup>);
  - A summary table that shows whether each of the buildings systems have the capacity to serve the estimated increased Workplace 2.0 occupancy.

## Appendix I – National Capital Ranking Policy Framework

### SUMMARY:

All capital projects of the Real Property Branch are to be ranked according to a set of criteria that embodies the objectives, commitments and policies of the Real Property Program.

Capital project priority ranking is an analytical process to assist and guide managers to develop a consensus around informed and rational decisions about the capital investment program. It defines parameters and key variables, and provides valuable information to clarify and inform investment decisions. It is a support for management judgment in decision making, not a substitute for it.

### OBJECTIVE:

The objectives of this policy are:

1. To establish the framework for the process of allocating the funds of the Capital Vote of the Real Property Program;
2. To establish the position of a specific project in relation to all other projects of the national program;
3. To assist in protecting the integrity of the capital budget of the Real Property Program, by ensuring the capital plan reflects the appropriate mandate, objectives and values;
4. To incorporate a businesslike approach in ranking projects;
5. To provide guidance to management for the inclusion and exclusion of projects as funding levels evolve; and
6. To assist in signaling costs and program implications associated with undertaking projects that do not meet businesslike criteria.

This section describes the work that the consultant/assessor will perform.

### Policy Statement:

It is the policy of the Real Property Branch that:

1. All capital projects will be ranked according to the framework provided in this Appendix I.
2. The criterion weighting parameters referred to in Appendix I will be reviewed and confirmed within the context of the Expenditure Management System.
3. The Expenditure Management System and Long Term Capital Plan processes will use the Priority Rank as the primary tool to establish the future funding profile required by the Capital Plan.
4. The scores of all projects must be reviewed on a regular basis and re-calculated if any factors affecting the score are modified.
5. The Priority Rank of all capital projects will be subject to an annual review at the managerial level, prior to the finalization of the Expenditure Management System submission.

## APPENDIX I - CAPITAL PROJECT PRIORITY RANKING FRAMEWORK

### Introduction

The Priority Ranking Framework provides a method of ranking capital investments in a rational and consistent way. It can be used to rank investments among any set of projects at the regional or national level. One of its main roles is to guide the selection of a portfolio of yet-to-be-approved investments which, together with capital expenditures already approved and committed, forms the basis for the Expenditure Management System and the Long Term Capital Plan.

In accordance with the Priority Ranking Framework, investments greater than \$1 million are rated, scored and ranked by Real Property Program Officers in the regions.

### The Criteria for Ranking

Six criteria are used by PWGSC to rank capital investments. These are:

1. Financial
2. Strategy
3. Timing
4. Health and Safety
5. Tenant/User Effects
6. Government Policy and Initiatives.

These criteria reflect relatively distinct aspects of real property projects that are relevant to ranking them. In rating projects against these criteria, double counting should be avoided as much as possible. For example, "health and safety" factors might make a contribution to a number of criteria such as financial return and investment strategy. In such a case, the analyst must judge what has already been taken into account, and minimize duplication and double counting in rating the criterion entitled "Health and Safety".

### The Criterion Weights

The criterion weight is a number that reflects the relative importance of that criterion. For the full set of criteria used, the weights always add up to unity or 100%. The convention used by PSPC is that each criterion is assigned a weight out of 100. The weights are a matter of judgment and are subject to revision as experience is gained.

**Table 1: Criterion Weights**

<b>Criterion</b>	<b>Weight</b>
Financial	30%
Strategy	20%
Timing	15%
Health and Safety	15%
Tenant/User Effects	10%
Government Policy and Initiatives	10%
<b>Total</b>	<b>100%</b>

### The Criterion Rating Scales

Each criterion has a scale of "0" (lowest) to "5" (highest), although in some cases the allowable values on the scale are constrained. The analyst uses the highest applicable rating in all cases, based on a combination of analysis and professional judgment. Each rating must be substantiated by a statement of supporting evidence. Ratings for the same project can change over time as objectives and circumstances change. For example, a project that is rated low on "timing" one year, might see this rating rise in following years as the proposed work becomes more urgent.

#### Criterion 1: Financial

The financial rating is based on the internal rate of return for the project. It includes imputed rent and "other" costs and revenues.

- In some situations, it may make sense to use the same IRR for a number of related projects. One example may be when a renovation program comprising several projects is undertaken for a single asset. Individual projects of such a program may take the value of the IRR for the whole property, as set out in the Asset Management Plan in which renovation is compared to alternative ways of meeting the tenant's needs.
- Capital projects involving non-building assets for which an IRR cannot be readily calculated, may be rated "3" on this criterion, if it could be demonstrated that significant benefits will be maintained or realized as a result of the capital project.
- Capital projects within the Parliamentary Precinct may be rated "3" on this criterion, when comparable estimates of market-based rental rates are unavailable.

- A rating of "3" may be used for this criterion where reasonable "ballpark" estimates have been used to calculate an IRR. This allowance assumes that, as planning continues and estimates become more accurate, the rating will be re-assessed. Caution must be exercised in using this allowance and if used it must be clearly identified in the Capital Project Briefing Note.

#### Scale

- 5 internal rate of return > hurdle rate plus 2%
- 4 internal rate of return > hurdle rate plus 1%
- 3 internal rate of return > or = hurdle rate
- 2 internal rate of return > hurdle rate minus 1%
- 0 internal rate of return < hurdle rate minus 1%

#### Criterion 2: Strategy

The strategy criterion includes all business-like aspects of PSPC's national, regional and community strategies, apart from the financial return calculation. These are mainly concerned with minimizing risks to the federal government through such measures as divestiture, introducing new technologies, and balancing. The portfolio between owned and leased properties. The underlying assumption for all capital projects is that they all comply with the principles of the MS and thus do not automatically rate a "5". To receive a high rating on strategy, the project must have special importance for the broad real property program, apart from its stand-alone investment characteristics. Capital projects specifically identified in an approved national sub-strategy, would qualify for a rating of "5", e.g. Wharf Disposal.

#### Scale

- 5 identified in a PSPC real property strategy at the national level
- 4 identified in a PSPC real property strategy at the regional level
- 3 identified in a PSPC Community Based Investment Strategy (CBIS)
- 2 identified in a PSPC Asset Management Plan
- 0 no positive effect on PSPC real property strategy

#### Criterion 3: Timing

The timing criterion includes all factors that contribute to urgency. The urgency rating should be based on a professional assessment of the degree to which delay would result in increased risks, increased net costs or forgone revenues for the Government of Canada. In addition, deadlines that are beyond the control of PSPC are taken into account in rating this criterion.

#### Scale

- 5 must be started now
- 4 must be started in the coming fiscal year
- 3 could be started one year after the coming fiscal year
- 2 could be started two years after the coming fiscal year
- 1 could be started three years after the coming fiscal year
- 0 could be started more than three years after the coming fiscal year

#### Criterion 4: Health and Safety

Any aspects of health and safety, apart from those adequately dealt with in previous criteria are considered here. Ratings on this criterion may be affected by health and safety legislation, regulations or PSPC's own objectives. To receive a "4" or a "5" on health and safety the investment would need to have critical non-monetary "health and safety" implications. A rating of "5" would require that the facility has been vacated pending resolution of the problem. A rating of "4" would require that corrective action is underway to avoid widespread or severe injury to health.

#### Scale

- 5 remedies high likelihood of fatalities
- 4 remedies small likelihood of fatalities
- 3 remedies risk of severe injuries and/or negative health effects
- 2 remedies risk of many minor injuries and/or negative health effects
- 1 remedies risk of a small number of minor injuries and/or negative health effects
- 0 no positive health and safety effects

#### Criterion 5: Tenant/User Effects

Two types of tenant/user effects might not be fully captured in the above criteria. These are tenant program delivery improvements (including those relating to internal efficiency) which are difficult to express in dollars, or external benefits to the public. The analyst must evaluate the negative effects on tenant program.

Delivery, if the project is not completed. Renovation of a departmental national headquarters building would not receive a rating of "5", however renovations to all departmental offices across the country resulting in an improved program delivery would receive a "5".

#### Scale

- 5 resolves or contributes to resolving tenant/user requirements from a national perspective
- 4 resolves or contributes to resolving tenant/user requirements from a regional perspective
- 3 resolves or contributes to resolving tenant/user requirements from a community perspective
- 2 minor contribution to resolving tenant/user requirements
- 0 no positive contribution to resolving tenant/user requirements

#### Criterion 6: Government Policy and Initiatives

The Government of Canada has multiple objectives with respect to real property management. These include objectives that are particularly important for the public sector, such as accessibility, promotion of heritage values, implementation of the Federal Code of Environmental Stewardship, and regional economic and social development (job creation). A rating of "4" or "5" on Government Policy and Initiatives must be supported by a written analysis of the importance of these public policy objectives and their application in this case.

#### Scale

- 5 Contribution to government policy and initiatives of national significance
- 4 Contribution to government policy and initiatives of regional significance
- 3 Contribution to government policy and initiatives of community and local significance
- 1 Minor contribution to government policy and initiatives
- 0 No positive effects on government policy and initiatives

#### Calculating Priority Scores

Each capital investment is ranked against all others regionally and nationally, according to its "priority score". The priority score is calculated by multiplying each rating by the weight for the criterion, and adding together the resulting criterion scores to obtain a total score for the investment.

Rating = likely performance on a particular criterion, scaled from 0 to 5

Weight = importance of the criterion, scaled from 0 to 100

Score = rating x weight

Priority Score = sum of the criterion scores (maximum 500)

**Table 2: Example of a Priority Score Calculation**

Criterion	Weight/100	Rating/5	Score (R x W)
Financial	30	3	90
Strategy	20	5	100
Timing	15	3	45
Health and Safety	15	4	60
Tenant/User Effects	10	4	40
Government Policy and Initiatives	10	2	20
<b>PRIORITY SCORE (Total)</b>			<b>355</b>

**ANNEX I - CALCULATION OF PERCENTILE RANK**

Percentile rank is a measure of the rank of one project compared to all others, based on a scale of 0 to 100. If a project is at the 80th percentile, this means that 80 percent of all projects in the group being considered rank below this given project. A percentile rank does not indicate the absolute value of the project, only its relative rank

To ensure consistency in calculating the priority rank of capital projects of the Real Property Program, the following convention is to be used. The percentile rank of an individual project is determined by establishing what the proportion of the projects below it are to the total set of projects. Thus, when calculating a percentile rank, the individual project is included in the total set of projects, but is excluded from the projects below it. It follows that projects which have the same project score have the same percentile rank. Furthermore, the normal rules of rounding apply when using percentiles.

For example, the percentile rank of ten projects is as follows:

**Table 3: The Percentile Rank of Ten Projects**

Project	Project Score	Percentile
Project Y	495	90
Project D	477	80
Project L	450	70
Project A	430	50
Project X	430	50
Project B	395	40
Project Z	380	20
Project E	380	20
Project M	325	10
Project O	321	0

## Appendix II - AMP template for analysis

### AMP Report Content Requirements:

The following pages detail the information and content requirements for completing the Asset Management Plan (The AMP).

#### Executive Summary:

The Executive Summary is a key section of the AMP. It provides a brief overview of the most essential information regarding the asset. It is a high level summation of the important information that flows from the option analysis, the BCR and the appraisal. It outlines conclusions, recommendations and should clearly identify any required actions that must be taken with regards to the asset. It is to be limited to three pages.

#### a. Content Requirements:

The first part of the executive summary should describe the asset's location, when it was built, floor area and the main use. It should also comment on the main findings and provide a summary conclusion from the sections of the AMP. This should include:

1. Description of the physical condition of the asset, identifying major problems or deficiencies
2. A narrative describing the operational, functional and financial performance of the facility along with a brief high level narrative discussing the asset's Heritage attributes if any.
3. Identifying key issues and conclusions pertaining to building performance,
4. **(Table 1)** showing the total amount of major repair and capital spending required for each year over the next upcoming five-year period.
5. Identification of the largest and most urgent projects required over the same period
6. Brief summary of the conclusions to the Options Analysis leading to a final recommendation an appropriate strategy for the asset, including a Financial Analysis Table **(Table 2)** the recommended investment strategy
7. Conclude the Executive Summary with a signature block **(Table 3)**.

#### 1. Asset Description:

Under this section the consultant is to provide a high level overview in a table format of the salient facts concerning the asset. This table provides the reader with a general understanding of the key characteristics regarding the asset.

##### 1. Content:

1. (Refer to **Table 1-1** for the Table Format)

#### 2. Asset Condition:

The purpose of this section is to identify key findings concerning the physical condition of the asset (briefly summarized from the Building Condition Report).

### 1. **Content:**

1. General narrative that summarizes the overall physical condition of the facility relating to and based on the FCI rating (poor, fair, good, excellent). The narrative should also outline briefly where this asset is in its lifecycle (i.e. beginning, mid-life, 2<sup>nd</sup> life renewal, etc.) based on the findings in the BCR.
2. List and briefly describe recent major component replacements and or renovations were undertaken during the past 10 years.
3. Specifics of condition of building's major systems and components (e.g. Architectural and structural, conveying systems, mechanical systems, electrical systems).
4. Summary of 5 and 30 year repair and capital work plan in a graphical representation
5. The conclusion should identify the largest and most urgent projects required for the upcoming five-year period.
6. The 30-year work plan for the building proposed in the BCR should be evaluated in terms of its completeness in responding to all building deficiencies and recapitalization requirements as well as whether it is realistic in terms of funding and implementation capabilities. Based on this evaluation, the BCR work plan may be modified to become the recommended Program of work. This section of the AMP should indicate the total cost of the Program of work over five years and over 25 years, as well as the annual spending by year for the first five years of the Program of Work.

### 3. **Operational Performance:**

The consultant is to examine the ability of the facility to comply with all codes and standards in areas such as health and safety, accessibility, environmental standards and energy efficiency. The consultant is also to comment on the daily operations and performance of the asset and how major issues are addressed and resolved.

Operational performance is frequently verified through operational compliance audits, and is generally commented on in the BCR. This information is required as part of the AMP and shall be reported through a checklist indicating the successful completion of these audits and the date of the audit, followed by a discussion of any deficiencies. The operational compliance checklist is presented in **(Table 3-1)**.

#### a. **Content:**

The narrative that would follow the operational compliance checklist is to include the following:

1. Description of the current approach to the management of the asset (Are daily operations, such as cleaning and maintenance, being effectively carried out? Are there any indications of user dissatisfaction with respect to daily operations?);
2. Discuss any areas of non-compliance with codes or standards identified in the operational compliance checklist. Describe any deficiencies that exist, as well as any remedial action that may be required (addressing areas of non-compliance only);

3. Separate heading for compliance or non-compliance with accessibility standards, and indication as to which year standard. Reference the date of the last Accessibility Audit.
4. Discuss in some detail some of the more important operational performance measures and issues along with providing data relating to the facility management indicators. Reference the BCR, Building Management Plan and Appraisal for information (Tables 3-2 and 3-3 );
5. The conclusion should indicate general level of operational performance, highlight areas for further action, and identify costs involved to bring the building into code compliance or to enhance the operating performance of the building. Ensure that any necessary projects have been incorporated into the Program of Work.

#### **4. Functional Performance:**

This section refers to the ability of a facility to satisfy the program delivery requirements of its clients.

##### **a. Content:**

1. Client Satisfaction (e.g. results of client survey).
2. Portfolio Strategy for Asset and/or Client Functional Requirements What are the key functional requirements of users and are they being met? Summarizes any key conclusions from client accommodation strategies, where available. What is the client's future space requires.
3. What deficiencies exist within the building that detracts from its ability to fulfill its assigned role?
4. What new systems, features or components will be required in the facility as its role changes over the upcoming planning period?
5. Comment on the extent to which the design and configuration of the building supports the building's functional role.
6. Does the building have adequate space for the functions it supports?
7. Comment on the efficiency of space utilization. Is it reasonable, how does it compare with other assets or standards for space utilization? Are there opportunities to optimize the use of space within the building?
8. Report the number of calls made from the client/tenants to the National Call Centre. Provide a statement on tenant satisfaction based on the Call Centre data. (Table 4-1) Trend analysis? Julie to look for example that SNC used as part of their BMP presentations.
9. Conclusions: should address the longer-term suitability of the building, limitations on its use, its flexibility and adaptability to possible changes in utilization. The conclusion should also highlight any areas that have been identified for further action, and make any recommendations concerning improving functional performance of the building. Identify any costs involved to enhance the functional performance.

#### **5. Market Analysis:**

The Market Valuation (Appraisal) is one of the key financial components in the overall Asset Management Plan development. The appraisal/valuation process is based on a comprehensive analysis of the building's functional and financial performance ranging from its highest and best use to its potential to generate income to its ability to compete in the local market. The appraisal analysis is a major input to the AMP option analysis and is used by PWGSC as one of the

leading documents that drive the business decisions for the asset. The appraisal analysis is completed independent of the AMP itself and will be made available upon its completion.

The purpose of the section is to capture the essential valuation data and market information pertaining to the asset. The following appraisal sections should be briefly summarized and incorporated into the AMP document.

**a. Content:**

**1. Local Market Context:**

- a. Community and Neighbourhood context (demographic information, economic prospects of relevance to the asset, description of surrounding area)
- b. Commercial development trends (developments that may impact the asset)
- c. Recent trading activities and pricing
- d. Investors and their influences that may be driving local real market conditions
- e. Outlook for the local commercial office real estate market and the market in general

**2. Market Survey:**

- a. Vacancy rates and Rental rates
- b. Relevant market trends
- c. Market demand in public and private sectors
- d. Key findings/conclusions and implications

**3. Asset Valuation:**

- a. Highest and Best Use (Definition of Highest and Best Use and a brief assessment of the findings from the appraisal)
- b. Income Approach to valuation using the Discounted Cash Flow analysis. Market value based on current condition.
- c. the Replacement Cost New of the building to determine the Facility Condition Index (FCI)
- d. A vacant land value estimate
- e. The improvement's replacement cost new, effective age, remaining economic life, and the depreciated replacement cost.
- f. A reasonably good narrative explaining the highest and best use of the site.
- g. exposure time analysis

Conclusions (**summary of the analysis and major findings are to be well defined**)

**6. Financial Performance:**

This section deals with providing a good examination of the financial performance of the asset based on its current use functional performance and overall building design. The focus here is on cost performance.

**Content:**

**Past and current performance:**

- Present 3 years' actual results and forecast results for the current year. This should be presented in a table format (**Table 5**).
- Present Pro-forma Unit Values (**Table 6**).

#### **1. Revenue Sources and Rentable Areas (Table 6.1)**

- Identify type of space and rentable areas
- Provide information on Rental Rate Structure

#### **Operating costs:**

Assess the financial performance of the facility with respect to its operating costs in a table format using benchmarks (i.e. National Average, BOMA Average, NCA, or Community Average and Provincial Average as appropriate). Comparisons of these benchmarks are made against other public and private real property organizations. This has included federal, provincial and municipal organizations who are members of the National Executive Forum on Public Property, as well as public and private members of the Real Estate Executive Board.

(Note: This applies to other performance indicators, not just operating costs, but not to all PWGSC performance indicators).

#### **Forecasted / Potential Financial Performance**

- 5-year financial forecast
- 25-year financial forecast
- Conclusions: Does the asset/property represent good investment value? Are operating costs in line with BOMA standards and how could the financial performance be improved?

#### **7. Strategic Content**

Purpose: to provide a strategic analysis of the NIS, CBIS and RIS as they relate to the facility and how the asset is performing in the NCA portfolio.

#### **Content:**

- Key elements and strategic directions from the NIS, CBIS, Node strategies, if appropriate, and the RIS relevant to the asset.
- This section should state whether or not the proposed plan and the identified options address and adhere to the NIS and CBIS; it should not present the principles described in the NIS.
- Property-specific opportunities and limitations (e.g. government-wide and PWGSC priorities and objectives).
- A Strategic Building Location Assessment.
- Conclusions: should summarize the strategic role of the facility given the tenant's needs and base on its ability to provide value to federal government program requirements.

### **Option Analysis:**

In this section of the report the consultant is to examine the full range of options available for the asset and to recommend an approach for the building that is realistic, and allows program requirements to be met in an effective and least-cost manner. Appendix "D"

### **Content:**

- Brief summary of key points concerning the evolving role of the asset from the Strategic Context section.
- Analysis of strengths, weaknesses, opportunities and threats facing the asset (SWOT Analysis). Use point form.
- Discuss the impact the asset has on the overall market such as short term and long term opportunities in the market and its competitiveness among like buildings.
- Identify and discuss factors or scenarios driving the options analysis. What are the program needs that may influence future options for the asset?
- Identify the full range of possible options concerning the future utilization of the facility.
- Evaluate the suitability of each available option. The evaluation of options can frequently be qualitative, as options may be able to be eliminated as a result of readily-identifiable shortcomings. However, in some situations, it may be appropriate to undertake a more detailed analysis of the available options, including a financial analysis and a risk assessment.
- Conclusion should identify which option is preferred and why. It should also identify any related implications or risks associated with the preferred option.

### **Summary and Recommendations:**

The consultant is to provide the AMP Summary as a standalone document. This document is to briefly summarize the most important findings and recommendations from the AMP, Appraisal and the BCR exercises.

### **Content:**

- Recommended investment strategy/management plan for the facility. Include all of the recommendations put forth in each section of the AMP with respect to improving the operational, functional or financial performance of the facility. Identify whether the AMP strategy involves any change in the role of the facility.
- Develop an implementation plan covering all actions required to carry out the AMP strategy. This plan should include a recommended Program of Work for the asset identifying priority actions, the timing of any actions, planning steps, required approvals, and the persons responsible for implementation.
- Comment on the urgency of any required actions.
- Identify and discuss the potential strategic impact of the recommended strategy on programs, and on broader corporate strategies (i.e. CBIS).
- Identify any implications for other facilities.

### **Appendices:**

The AMP report is to provide the detailed information needed to support the analysis and conclusions of the main sections of the AMP. The use of appendices for detailed information allows the main document to be shorter and more user friendly.

**Content:**

- Site Plan, Floor Plans and/or Picture of Facility 25-Year Program of Work
- Financial Analysis
- Options Analysis- (all spreadsheets outlining the analysis of the options are to be included as part of the AMP Report).
- National Investment Strategy
- Federal Heritage Buildings Designation / Classification

**Appendixes & Tables**

**Tables to be included in AMP Executive Summary Section:**

**Table 1**

**FIVE-YEAR WORK PLAN TABLE TO BE INSERTED IN THE EXECUTIVE SUMMARY**

	Years					Total
Repair						
Minor Capital (less than \$1M)						
Major Capital (greater than \$1M)						

**Table 1-A**

**FINANCIAL ANALYSIS TABLE FOR OPTIONS CONSIDERED  
TO BE INSERTED IN THE EXECUTIVE SUMMARY**

<b>FINANCIAL ANALYSIS OF OPTIONS</b>			
<b>Options</b>	<b>25 Year PVCOA</b>	<b>Net Present Value (\$M)</b>	<b>Internal Rate of Return (%)</b>
Option 1			
Option 2			
Option 3			

**Table 1-1**

**Asset Description**

DESCRIPTION						
<b>Asset Name:</b>			<b>Type:</b>			
<b>Address:</b>			<b>Responsibility Centre:</b>			
<b>Client(s):</b>			<b>Occupancy Type:</b>			
			<b>Management Responsibility:</b>			
			<b>FHBRO Designation:</b>			
			<b>FBI:</b> Yes/No/When			
<b>Site Area:</b>			<b>Legal Description:</b>			
<b>Maximum Permitted Building Area:</b>			<b>Zoning:</b>			
<b>Land Use:</b>						
<b>Building Characteristics:</b>						
<b>Building Class:</b>						
<b>Public Utilities and Services:</b>			<b>Parking Available:</b>			
<b>Site Access:</b>			<b>Parking Requirement under Zoning 150:</b>			
<b>Services:</b>						
<b>Construction Date:</b>			<b>Floor Areas:</b>			
<b>Major Renovation Dates:</b>			<b>Gross:</b>			
<b>Purchase Date:</b>			<b>Rentable (R):</b>			
<b>Purchase Price:</b>			Office			
<b>Space Optimization:</b>			Storage			
<b>Federal Occupancy:</b>			Commercial			
<b>Square Metres per FTE:</b>			Total			
			Useable (U):			
OCCUPANCY						
<b>Current Building Occupancy Rate: Portfolio CMA</b>			<b>Expiring</b>		<b>Projected Average</b>	
<b>Vacancy Rate:</b>			<b>Ol's/Leases:</b>		<b>Occupancy Rate:</b>	
<b>Market Vacancy Rate:</b>						
MARKET DATA						
<b>Market Value (Stabilized Occupancy):</b>						
<b>Vacant Building Market Value (if applicable):</b>						
<b>Vacant Land Value:</b>						
<b>Effective Gross Rents:</b>			<b>Market</b>		<b>Actual</b>	
Office					Maximum building Density Utilization:	
Commercial					Highest and Best Use as Improved:	
Storage					Highest and Best Use:	
<b>Capitalization Rate:</b>						
BUILDING CONDITION INDICATORS						
<b>Chronological Age:</b>		<b>Effective Age:</b>		<b>Remaining Economic Life:</b>		
FIVE YEAR CAPITAL AND REPAIR BUDGET						
	<b>Year</b>	<b>Year</b>	<b>Year</b>	<b>Year</b>	<b>Year</b>	<b>TOTAL</b>
<b>REPAIR</b>						
<b>CAPITAL</b>						
<b>TOTAL</b>						
25-YEAR CAPITAL PLAN						

Solicitation No. – N° de l'invitation  
EZ899-173144/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
tpv028

Client Ref. No. - N° de ref. du client

File No. - N° du dossier

CCC No./N° CCC - FMS No./N° VME

<b>Total 25 Year Capital Budget:</b>		<b>Total/m<sup>2</sup>:</b>	<b>Annual cost of Capital/m<sup>2</sup>:</b>
<b>FINANCIAL ANALYSIS</b>			
<b>5 Year ROI:</b>	YR 1 YR 2 YR 3 YR 4 YR 5	<b>EACOA (25 year):</b>	O&M PILT CAPITAL HOLDING* Total EACOA
<b>5 Year Average:</b>			
<b>25 Year ROI:</b>			
<b>NPV:</b>		<b>*PV of Initial Investment Less Reversion Value</b>	
<b>OPERATIONAL / FUNCTIONAL INDICATORS</b>			
<b>AFD:</b> <b>Code/By-Law Compliance:</b> <b>Energy Efficiency Rating:</b> <b>Seismic Rating:</b> <b>Building Efficiency:</b> <b>Churn Rate:</b> <b>Tenant Satisfaction:</b>			
<b>DESCRIPTION SUMMARY</b>			
<b>Describe in some summary detail the asset's overall condition relating to the following major components.</b>  <b>Architectural:</b> <b>Mechanical/Electrical:</b> <b>Accessibility:</b> <b>Environmental:</b>			

**Table 3-1**

**This table outlines the operational compliance guidelines applicable to the Asset.**

**OPERATIONAL PERFORMANCE CHECKLIST**

<b>GUIDELINE</b>	<b>NAME OF BUILDING</b>
Accessibility compliant	Make reference to the current "Accessibility Standard for Real Property" and the Real Property Accessibility (RPA) Policy. Briefly discuss their purpose and generally highlight their policy content.
Provincial/National Building Code Compliant	Reference and discuss briefly the current Provincial Building Code, National Building Code of Canada and the National Fire Code (NFC). (See BCR)
National Fire and Safety Code Compliant, including evacuation plan compliant	Reference the source of material that deals with Fire and Safety and the current building's evacuation plan (i.e. the last update and any noted deficiencies in the plan). (See BCR).
Canada Labour Code Complaint	<b>Julie?</b>
TBS Temperature, Humidity and Ventilation	Reference the Treasury Board's "Occupational Safety and Health Directive" (effective January 1, 2006), Part II, 2.2 Environmental Conditions and its guidelines for temperature, humidity and ventilation in buildings occupied by Public Service employees.  (See BCR)
Local By-Law Compliant	Briefly outline the current zoning for the asset and its compliance.
Regularity of testing records	From the BCR discuss equipment and systems regulatory testing requirements for any of the following items. (The last and next update).  Mechanical:  Electrical:  Vertical Transportation:  Emergency Generator:  (See BCR)

**Table 3-2**

**Table 3-2 provides commentary on some of the more important operational performance measures/issues. Except where identified, Operational Performance statements should be excerpted from the most recent Building Condition Report.**

**TABLE ENVIRONMENTAL ISSUES**

<b>ITEM</b>	<b>COMMENTS</b>
Fire & Life Safety	<p>Discuss in some detail the findings from the BCR with respect to Fire and Life Safety issues. Commentary should address but not limited to the following items:</p> <ul style="list-style-type: none"> <li>• Are the stairways adequate to serve the present reported occupancy? Do they meet exit capacity compliance? (i.e. fire code requirements).</li> <li>• Does the heritage nature of the building impede making the necessary adjustments and or corrections to certain parts of the asset to address life and safety issues?</li> <li>• Do the evacuation plans require updating to reflect changes made to the building such as new exits etc?</li> <li>• Note any Fire Detection/Protection (Deficiencies).</li> <li>• Are any of the noted deficiencies expected to be dealt with in any renovation program if planned?</li> </ul>
Accessibility	<p>Focus should be mainly on the findings of audits and their recommendations. Describe any non-compliance issues and any of the accessibility challenges the asset is facing. The RPA policy is directed at ensuring barrier-free access to and use of government facilities and includes requirements for accessible washrooms, tactile signage, and assistive listening devices. Audit and Ethics Branch identify 10 categories of specific standards from the CSA CAN/CSA-B651-M95, Barrier-Free standards. Comments on these categories are required.</p>
Indoor Air Quality	<p>The BCR should reference the IAQ audits and their findings and recommendations (i.e. humidity levels in the building and temperature control problems if any. Also any ventilation problems with the building should be identified and discussed here along with air circulation. Further discuss whether the mechanical systems are contributing to in-door air quality problems and if so what measures are being taken to correct the issues.</p>
Energy /Management Consumption	<p>Identify if a Go-Green Heritage assessment or any</p>

	<p>energy audits have been completed for the building. Outline the main findings and recommendations of these reports and studies.</p> <p>Discuss any upgrades that have been completed to the electrical systems in this building over the years, including reported Federal Building Initiatives (FBI) work.</p>
Water Consumption/Conservation	<p>Make reference to the Potable Water Quality Assessment if one was completed. Outline its findings and recommendations.</p>
Other Environmental Items	<p>Reference should be made to PWGSC's latest Sustainable Development Strategy (SDS). It contains goals and targets related to sustainable design, construction as well as renovation and management of its building portfolio.</p> <p>Information regarding environmental issues relating to the building should focus on previous reports and studies (BCRs as presented in AVS tool format, any asbestos reporting, Phase I and Phase II &amp; III Environmental Site Assessment reporting, Property Manager and tenant questionnaires and any Waste Audit reports.</p> <p>Other environmental issues should include:</p> <ul style="list-style-type: none"> <li>• Air Emissions:</li> <li>• Asbestos Containing Materials (ACMs):</li> <li>• Lead Containing Materials:</li> <li>• Ozone Depleting Substances (ODS):</li> <li>• PCB Containing Equipment:</li> </ul>
Security	<p>If a threat and risk assessment was prepared for the building and its occupants provide an overview of its findings and recommendations as they relate to the security nature of the building. In some cases the T&amp;R is a client driven initiative.</p>
Elevators	<p>Identify the number and types of elevators in the building. Comment on the condition of the vertical transportation. Has it been well maintained/and properly serviced. Do the elevators perform adequately to meet the needs of the building occupancy? Are there any constraints within the building from a structural prospective that impedes updating the elevators with respect to the heritage features of the building?</p>
Heritage Designation	<p>Discuss whether the Federal Heritage Buildings Review Office reviewed the building and site. Briefly discuss the building's Heritage Designation if any and outline any stringent development and design restriction especially if a renovation program is being planned. Reference should be made to the Heritage Statement in the BCR relating to the heritage nature and attributes of the building and its components.</p>

Notes:

- 1) Discuss the Environmental performance of the building, and its compliance with the sustainable development policies of the federal government. This should include the identification of any contaminants that may be present, and how they are being handled.
- 2) Discuss the performance of the building with respect to energy efficiency. Are energy costs in line with what might be expected for other buildings of similar size and use? Identify any factors that may cause energy costs to be high, as well as any actions that may be considered for reducing energy costs.

**Table 3-3**

**Facility Management Indictors**

Occupants =	
Useable area =	
Rentable area =	
Gross area =	
Rentable area/occupant =	
Building efficiency (rentable area ÷ gross area) =	
Electrical energy usage =	
Natural gas usage =	
Steam/hot water =	
Chilled water =	
Water =	
Occupancy =	
Gross to usable area ratio =	
Gross-up factor =	

Description	Formula	(A)	(B)	Results
Efficiency Ratio (%)	$(\text{Rentable Area} / \text{Gross Area}) \times 100$			
Vacancy Rate (%)	$(\text{Unoccupied Rentable Area (A)} \div \text{Rentable Area (B)}) \times 100$			
Density Ratio (%)	$(\text{Rentable Area (A)} \div \text{\# of Workstations/Occupants (B)})$			

**Table 4**

**Table 0-1, National Service Call Centre Dispatched Called**

Reason for Service Call	Number of Calls
Cleaning	
Interior Lighting	
Elevators	
Electrical	
Fire and Life Safety	
HVAC	

Other Building Maintenance	
Plumbing	
Roads and Grounds	
Security	
Structural / Roof	
Environmental	
Waste Management	
<b>Total</b>	

**Table 5**

**FINANCIAL PERFORMANCE PRO-FORMA TABLE**

<b>Description</b>	<b>(Insert Year) Planning Year</b>	<b>Previous Year 1</b>	<b>Previous Year 2</b>
<b>Revenue:</b>			
Reimbursing – Parking Commercial Non-Reimbursing			
<b>Total Revenue</b>			
<b>Operating Expenses:</b>			
Cleaning O&M, Labour, Minor repairs Utilities Roads/Grounds/Security Administration PILT			
<b>Total Operating Expenses</b>			
<b>Project Plan Repairs &amp; Other</b>			
<b>Total Expenses</b>			
<b>NOI</b>			
<b>Capital Projects</b>			
<b>Net Cash Flow</b>			

**Table 6**

**PRO-FORMA UNIT VALUES**

<b>Description</b>	<b>(Insert Year) Planning Year</b>	<b>(Insert Year) Unit Values</b>
<b>Revenue:</b> Reimbursing – Parking Commercial Non-Reimbursing		
<b>Total Revenue</b>		
<b>Operating Expenses:</b> Cleaning O&M, Labour, Minor repairs Utilities Roads/Grounds/Security Administration PILT		
<b>Total Operating Expenses</b>		
<b>Project Plan</b> Repairs & Other		
<b>Total Expenses</b>		
<b>NOI</b>		
<b>Capital Projects</b>		
<b>Net Cash Flow</b>		

**Table 6-1**

**Area Breakdowns**

Type	Square Metres	% of Rentable Area
<b>Gross Area</b>		
<b>Rentable Areas</b>		
Office		
Commercial		
PWGSC		
Security		
Amenities		
<b>Total Rentable Area</b>		
<b>Useable Area</b>		

**Table 6-2**

**Comparing Unit Operating Costs**

	Cleaning	Repairs/ Maintenance	Utilities	Security	Administration	PILT	Total
Building							
National Average							
Community Average							
Provincial Average							
BOMA Average							

**APPENDIX "B"**

**AMP SUMMARY**

**Building Name:**

**Building Address:**

<b><u>Occupancy Information</u></b>	<b><u>Building Information</u></b>
<b>Clients/Tenants (Federal):</b>	<b>Responsibility Centre:</b>
<b>Clients/Tenants (Private):</b>	<b>Type:</b> Crown Owned – PWGSC
<b>Management Responsibility:</b> PWGSC	<b>No. of Buildings:</b>
<b>Land Information</b>	<b>No. of Floors:</b>
<b>Asset Type:</b> Outline whether the asset is used for office or special purpose accommodation.	<b>Building Class:</b>
<b>Zoning:</b>	<b>Heritage / FHBRO Designation:</b> "Classified"
<b>Parking:</b> Type of parking spaces (heated underground and or surface parking). <b>See BCR</b>	<b>Environmental Performance Designations – BOMA Best, LEED, etc.</b>
<b>Legal Description:</b> Provide the legal description for the asset.	<b>FCI</b>
<b>Parking Stalls:</b> Discuss the number of parking stall both underground and surface. <b>See BCR &amp; Appraisal</b>	<b>Construction Date:</b>
<b>Parking Requirements Under Zoning:</b> Market norms compared to actual spaces both underground and surface.- <b>Appraisal</b>	<b>Major Renovation Dates:</b>
<b>Public Utilities and Services:</b> Brief outline of the various municipal services available to the property and if the property is connected to a centre heating and cooling plant utility. <b>See Appraisal &amp; BCR</b>	<b>Purchase Date:</b> N/A – Crown Construct
<b>Site Access:</b> Vehicular access from Wellington Street. The site is also well serviced by public transportation.	<b>Purchase Price:</b> N/A – Crown Construct
<b>Land Area:</b> <b>Appraisal &amp; Win Fin documents</b>	<b>Market Value (Stabilized Occupancy):</b>
<b>Maximum Permitted Building Area:</b> <b>Appraisal</b>	<b>Vacant Building Market Value:</b> <b>See Appraisal</b>
	<b>Vacant Land Value:</b> Amount and Effective Date: <b>See Appraisal</b>
	<b>Payment in Lieu of Taxes:</b> <b>See Appraisal</b>
	<b>Floor Area (m2):</b> <b>See Win Fin Data files</b>
	<ul style="list-style-type: none"><li>• Useable area</li><li>• Rentable area</li><li>• Gross area</li></ul>
	<b>Occupancy:</b>
	<ul style="list-style-type: none"><li>• <b>Federal/Other:</b> Percent Occupancy</li></ul>
	<b>Square Meters per FTE Population:</b>

**Space Optimization:**

**Legal Land Use:** Description of current use and compliance to legal use. **Appraisal**

**1. Executive Summary**

**This section is to embody the key elements found in the Executive Summary of the AMP document.**

**2. Asset Description**

Brief description of the asset outlining any special attributes. **Reference information from the BCR .**

**3. Asset Condition Refer to BCR**

**General:**

A general outline of the overall condition of the asset and any planned program of work for the asset (renovations program and or any major component replacement). The AMP consultant will also be expected to further outline the condition of the asset by providing a brief narrative describing the overall condition of each of the major base building components listed below.

- **Site**
- **Structure**
- **Roof**
- **Exterior Walls**
- **Windows & Doors**
- **Interior Finishes**
- **Mechanical Systems**
- **Electrical Systems**
- **Heritage**

**Vertical Transportation**

Highlight the main characteristics of the vertical transportation system for the building:

- Number and type of elevators
- Overall condition of the vertical system
- Last updated if applicable
- Next update or replacement if planned.

**Security**

Provide a brief overall condition of the system along with the expected remaining service life. Also provide a one line sentence when the next update and replacement of the system is scheduled.

#### **4. Operational Performance Reference BCR and other related documents**

##### **Fire & Life Safety:**

The consultant will provide a brief narrative outlining the following life and safety issues.

- Code issues as they relate to life safety and how they impact on any FHBRO components.
- Evacuation plans.

##### **Accessibility**

- Highlight issues from the Accessibility Audit Report. Discuss any non compliance accessibility issues

##### **Indoor Air Quality**

- Briefly discuss any poor indoor air quality issues and concerns and how air quality will be addressed going forward. Reference any reports and or studies reviewed.

##### **Other Environmental Items**

###### **Asbestos Containing Materials (ACMs):**

A 2002 Asbestos report included visual inspection and testing of samples and yielded both positive and negative results. Asbestos containing material was noted in the building. Asbestos abatement will be carried out as part of the major building retrofit.

###### **Lead Containing Materials:**

###### **Ozone Depleting Substances (ODS):**

###### **PCB Containing Equipment:**

###### **Security**

- Date of the last Risk Assessment completed for the building and occupants.

**5. Functional Refer to Appraisal**

**Building Efficiency Ratio:**

**Vacancy Rate**

- **Market Vacancy Rate:** 5.4% (Class A, CBD, (Q1/01)
- **Building Vacancy Rate:** 0.3%
- **Projected Average Occupancy Rate:** 100%
- **Expiring Ol's/Leases:**
- **% of Workstation Types (Open/Closed):** N/A

**Tenant Survey Information:**  
**Concluding Statement:**

**6. Market Refer to Appraisal Information & Data**

- **Market Value (Stabilized Occupancy):**
- **Vacant Land Value:**
- **Market Rental Rates:** Gross Effective rates of /m<sup>2</sup> Gross Effective Rents: /m<sup>2</sup>

**7. Financial Refer to AMP Document**

**Scenario 1 (Retention with BCR Recommended Retrofit):**

	2014	2015	2016	2017	2018
<b>Gross Effective Income</b>					
<b>Expenses</b>					
<b>N.O.I.</b>					

- **Comments:**
- **Unit Cost Comparison:** Projections for both revenue and operating compared to market benchmarks.

**8. Strategic**

**9. Development/Redevelopment Potential Refer to Appraisal**

- **Highest and Best Use:** Refer to Appraisal Document
- **Options Analyzed:** Refer to Findings from the Option Analysis

**10. Recommended AMP**

**Best Option:** Recommendation from AMP and Option Financial Analysis

**Appendix “C”**

**PWGSC Documentation/Report Check-list**

Document Name	Available	Not Available
Previous Building Condition Report (BCR)	✓	
Current Draft Building Condition Report and Event Listing	✓	
Building Capacity Study	✓	
Building Functionality Assessment	✓	
Level Three Technical Studies	✓	
Client's Functional Needs Assessment		
Drawings	✓	
<b>Financial and Other Documents</b>	<b>Available</b>	<b>Not Available</b>
Building Management Plans (3 years)	✓	
Building Planning Documents	✓	
Previous AMP	✓	
Operating Instrument	✓	
National Service Call Records	✓	
Criticality Assessment		
Workplace 2.0 Policy	✓	

## Appendix D – Options Analysis

### Financial Input Factors

#### Escalation Rates

Item	Rate
Land	
Service Fee	
Construction & System	
Lease Purchase	
Rent	
O&M	
Taxes	

#### Discount Rates

Item	Discount Rate
Annual Effective rate 25 years (long term Canada Bonds)	
Consumer Price Index	

#### Fees

Item	Fee
PWGSC Property Management	
PWGSC Leasing	
PWGSC fees on Capital Works	
Developer Fee on Capital	
Contingency, New Construction	
Contingency, Renovation	
PWGSC Implementation Fee	

#### Amortization Periods

Amortization	Years
New Construction	
Renovation (Initial Capital)	
Sustaining Capital	
Fit-up	

**Refurbishment Costs (Office)**

<b>Element</b>	<b>Cost Base</b>
Refurbishment	
Moving & Signage (within site)	
Consultants	
Disbursements	
Contingency	
A&E	
Property Management	

**Fit-up Costs (Office)**

<b>Element</b>	<b>Cost Base</b>
Fit-up costs	
Moving & Signage	
Consultants	
Disbursements	
Contingency	
A&E	
Property Management	-up

**Option-Specific Assumptions**

**Option 1: Asset Retention - with BCR Upgrading**

- The financial analysis is performed on a before-tax cash-flow basis with the equity position at 100% and a 25-year investment horizon assumed to commence 2015.
- Operating costs are based on 2015.budget estimates;
- All recommended BCR work plan items would be implemented;
- Market value of the asset (See Appraisal) is included as opportunity cost;
- Present value of the residual (reversion) is the present value of the estimated market value of the asset in Year 25. The market value is estimated by applying the reversion capitalization rate to the net income in Year 26;
- Net rents are stabilized for a five year term and will increase every subsequent term by the escalation rates quoted herein;
- Space will be refurbished every 10 years at the prescribed rates herein; and;
- Operating costs and taxes increase annually as per the PWGSC escalation rates identified.

**Option 2: Asset Disposal and Lease Back**

- The asset will be sold and PWGSC will lease the entire building (see below);
- The market value of the asset is considered to be the opportunity cost at the beginning of the horizon and its five-year escalated value is calculated as revenue from a sale to a private sector investor;
- Escalated market rents will be applicable once the building is sold and a lease is negotiated with the new owner;

- Net rents will be stabilized for a 5-year term and escalate accordingly for consecutive 5 years terms thereafter; and,

- It is not likely a private sector investor would be willing or able to fund the considerable amount of capital upgrades required at the subject property at the expected level of net rent. Therefore, it is assumed that the Crown will need to fund the capital upgrades which also include the identified major retrofit.

***Option 3: Relocate Occupants to Off-site Leased Accommodation***

- The asset will be vacated and the property sold out of the Crown inventory;
- It is assumed that the Crown will remain in-situ for five years before a suitable investor/purchaser is found as well as new leased accommodation for the government tenant;
- The market value of the asset is considered to be the imputed purchase value at the beginning of the horizon and its five-year escalated value is calculated as revenue from a sale to a private sector investor;
- It is assumed that the market value is not discounted/reduced to reflect the vacancy left by the move of the government tenant;
- It is not likely that existing vacant space comparable in quality and size to the subject could be found in the market therefore it is assumed that a build to suit lease would result. Build to suit space is expected to be Class 'A' since new buildings are typically constructed to this level. Current market rental rates for similar space in a suburban area is expected to be \$215/m<sup>2</sup>R (\$20/ft<sup>2</sup>);
- New buildings are built at a higher space efficiency level than older Class 'B' buildings. The subject has a gross-up off 22% which can easily be reduced to 10% in a modern building. With a current total usable area of....., the new space is expected to have a total rentable area of ..... compared to the current area of.....;
- The new area is expected to be fit-up to as per the recommended amount in the BCR: \$.....
- Net rents will be stabilized for a 5-year term and escalate accordingly for consecutive 5 years terms thereafter;
- The private sector landlord is assumed to perform the necessary capital upgrades to its building to ensure federal government occupancy standards are met;
- Before the investor takes possession of the asset in Year 6, the Crown will perform basic capital upgrades to cure any depreciation at an annual rate of .....of the asset's market value; and,
- The office space will be fit-up in Year 6 and refurbished every 10 years with this cost borne by the Crown.

Solicitation No. - N° de l'invitation  
EZ899-173144/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
tpv028

Client Ref. No. - N° de ref. du client

File No. - N° du dossier

CCC No./N° CCC - FMS No./N° VME

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## **Appendix III – Code compliance Template**

### **PUBLIC SERVICES AND PROCUREMENT CANADA**

#### **CODE COMPLIANCE**

**NAME OF BUILDING**

**ADDRESS OF BUILDING**

**CITY, PROVINCE**

**PSPC ASSET NUMBER**

**TB DFRP IDENTIFIER**

**PREPARED BY:**

**GROUP NAME**

**REAL PROPERTY SERVICES**

**PUBLIC SERVICES AND PROCUREMENT CANADA**

**DATE:**

**PROJECT NO:**

## CODE COMPLIANCE EVALUATION: *BUILDING NAME*

### TABLE OF CONTENTS

<b>1.0</b>	<b>INTRODUCTION ...</b>	<b>X</b>
<b>2.0</b>	<b>APPLICABLE CODES .....</b>	<b>X</b>
2.1	Legislative Requirements	
2.2	Treasury Board Standards	
2.3	British Columbia building code and British Columbia Fire Code	
2.4	Referenced Standards	
<b>3.0</b>	<b>BUILDING DESCRIPTION .....</b>	<b>X</b>
3.1	General Background	
3.2	Location	
3.3	Date of Construction	
3.4	Significant changes of design, use or occupancy	
<b>4.0</b>	<b>APPLICATION OF THE NFC AND NBC TO THE EXISTING BUILDING.....</b>	<b>X</b>
4.1	Application	
4.2	Building Size, Use and Occupancy	
4.3	Construction Requirements	
4.4	Spatial Separation	
4.5	Fire Department Access	
4.6	Fire Separations and Compartmentation	
4.7	Egress and Exits	
4.8	Fire Protection Systems and Emergency Power	
4.9	Fuel Storage	
4.10	Washroom Requirements	
4.11	Barrier-free Requirements	

### BIBLIOGRAPHY

## **1.0 INTRODUCTION**

- **Background:** the code summary review is an integral component of the building condition report. To meet this objective the consultant shall undertake a code summary review of the existing buildings known as (Building name). The purpose of this service requirement is to gather information, access and make event recommendations related to existing code conditions and the latest fire and life safety codes.
- **Scope of Work:** this report shall act to identify and articulate the key fire and life safety requirements stipulated within the applicable codes, and review the parameters of the codes in light of the existing building conditions not undergoing renovation.
- **Methodology:** the contents of the report is to be based on visual analysis, current code requirements, existing conditions, tempered by the knowledge & expertise of certified subject matter experts, comprehensive site visit; coupled with a prudent analysis of the applicable situation and relevant codes.
- **Limitations:** the summary review is limited to the technical performance the key fire and life safety code requirements. Also, available asset information may be limited or not available.

## **2.0 APPLICABLE CODES**

### **2.1 LEGISLATIVE REQUIREMENTS**

(Building name) constitute federally occupied building, therefore the Canada Labour Code (CLC) and the Canada Occupational Health & Safety Regulations (COHS) apply. Although the National Building Code (NBC) is referenced by the COHS Regulations it is to be applied in prudent, practical and reasonable manner with regard to existing buildings that may be non-compliant with the current code. Presently, the COHS Regulations reference the 2010 edition of the (NBC) and the National Fire Code (NFC) this may be subject to future change within the COHS regulations.

### **2.2 TREASURY BOARD STANDARDS**

The Treasury Board (TB) Fire Protection Standard (2010) stipulates that its policy intent is to "...protect and minimize losses to federal real property and protect the lives of those who use these properties from fire-related risk" and expresses that this shall be the responsibility of the Custodian Department that has administrative responsibility for the building. This policy references the NBC, NFC and the intent of applicable local codes that may meet or exceed.

### **2.3 BRITISH COLUMBIA BUILDING CODE AND BRITISH COLUMBIA FIRE CODE**

From a federal perspective, these codes are on a voluntary basis; however if practical the intent is to meet or exceed them. For the purpose of this report the NBC and NFC shall prevail as the applicable codes.

## **2.2 REFERENCED STANDARDS**

**The NBC and NFC act to collectively reference numerous Standards. These standards are directly linked to functional and technical statements contained within the codes; therefore they shall be integrated and clearly stated within the summary report.**

## **3.0 BUILDING DESCRIPTION**

### **3.1 GENERAL BACKGROUND**

### **3.2 LOCATION**

### **3.3 DATE OF CONSTRUCTION**

### **3.4 SIGNIFICANT CHANGES OF DESIGN, USE OR OCCUPANCY**

## **4.0 APPLICATION OF THE NFC AND NBC TO THE EXISTING BUILDING**

### **4.1 APPLICATION**

### **4.2 BUILDING SIZE, USE AND OCCUPANCY**

#### **4.2.1 Building size**

#### **4.2.2 Use and occupancy**

#### **4.2.3 Occupant load**

### **4.3 CONSTRUCTION REQUIREMENTS**

### **4.4 SPACIAL SEPARATIONS**

Exposure conditions at exits

### **4.5 FIRE DEPARTMENT ACCESS**

- Fire department access routes
- Fire department access.

### **4.6 FIRE SEPARATIONS AND COMPARTMENTATION**

- Fire separations
- Fire protection ratings

### **4.7 EGRESS AND EXITS**

- Number of exits and travel distance
- Door swing
- Distance between exits
- Exit capacity
- Exit discharge
- Door hardware
- Egress configuration
- Integrity of exits

### **4.8 FIRE PROTECTION SYSTEMS AND EMERGENCY POWER**

- Fire alarm system

- Sprinkler system
- Standpipe system
- Emergency lighting
- Exit signs

#### **4.9 FUEL STORAGE**

#### **4.10 WASHROOM REQUIREMENTS**

#### **4.11 BARRIER-FREE REQUIREMENTS**

#### **BIBLIOGRAPHY**

Solicitation No. – N° de l'invitation  
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## **Appendix IV - Accessibility Audit Template**

### **PUBLIC SERVICES AND PROCUREMENT CANADA 2005-2009 ACCESSIBILITY AUDIT PROGRAM**

**ACCESSIBILITY AUDIT  
NAME OF BUILDING  
ADDRESS OF BUILDING  
CITY, PROVINCE  
PSPC ASSET NUMBER  
TB DFRP IDENTIFIER**

**PREPARED BY:  
GROUP NAME  
REAL PROPERTY SERVICES  
PUBLIC SERVICES AND PROCUREMENT CANADA**

**DATE:           PROJECT NO:**

## **ACCESSIBILITY EVALUATION: *BUILDING NAME***

### **TABLE OF CONTENTS**

<b>1.0</b>	<b>INTRODUCTION ...</b>	<b>X</b>
1.1	Federal Standards	
<b>2.0</b>	<b>FACILITY OVERVIEW.....</b>	<b>X</b>
<b>3.0</b>	<b>WALKWAYS .....</b>	<b>X</b>
3.1	Existing Conditions	
3.2	Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard	
3.3	Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment	
<b>4.0</b>	<b>PARKING .....</b>	<b>X</b>
4.1	Existing Conditions	
4.2	Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard	
4.3	Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment	
<b>5.0</b>	<b>BUILDING ENTRANCES .....</b>	<b>X</b>
5.1	Existing Conditions	
5.2	Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard	
5.3	Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment	
<b>6.0</b>	<b>VERTICAL MOVEMENT .....</b>	<b>X</b>
6.1	Existing Conditions	
6.2	Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard	
6.3	Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment	
<b>7.0</b>	<b>INTERIOR DOORS AND CORRIDORS (Base Building) .....</b>	<b>X</b>
7.1	Existing Conditions	
7.2	Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard	
7.3	Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment	
<b>8.0</b>	<b>WASHROOMS .....</b>	<b>X</b>
8.1	Existing Conditions	

8.2	Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard	
8.3	Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment	
<b>9.0</b>	<b>DRINKING FOUNTAINS</b> .....	<b>X</b>
9.1	Existing Conditions	
9.2	Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard	
9.3	Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment	
<b>10.0</b>	<b>PUBLIC TELEPHONES/TACTILE SIGNAGE</b> X	
10.1	Existing Conditions	
10.2	Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard	
10.3	Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment	
<b>11.0</b>	<b>PUBLIC AREAS</b> ....	<b>X</b>
11.1	Existing Conditions	
11.2	Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard	
11.3	Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment	
<b>12.0</b>	<b>BUILDING EXEMPTIONS</b> .....	<b>X</b>
12.1	Recommended Exemptions	
<b>13.0</b>	<b>ACCESSIBILITY COMPLIANCE SCORE</b> .....	<b>X</b>
13.1	Existing Compliance with B651 95	
13.2	Existing Compliance with B651 12	
<b>14.0</b>	<b>CLASS C CONSTRUCTION ESTIMATE</b> .....	<b>X</b>

## BIBLIOGRAPHY

**APPENDIX A:** Accessibility Standard for Real Property, November 1, 2006  
Treasury Board of Canada Secretariat

**APPENDIX B:** Project Team

## 1.0 INTRODUCTION

This Accessibility Audit report has been initiated by Public Services and Procurement Canada Asset and Facility Management Services in response to the 2005 'Accessibility for All' report, prepared by the Subcommittee on the Status of Persons with Disabilities for the Standing Committee on Human Resources, Skills Development, Social Development and the Status of Persons with Disabilities.

The Subcommittee on the Status of Persons with Disabilities was mandated to examine various issues related to accessibility for persons with disabilities including the accessibility of buildings and transportation under federal jurisdiction; issues of accessibility related to Parliament Hill, the accessibility of benefits from the Canada Pension Plan, the accessibility of jobs in the federal public service; as well as tax measures for persons with disabilities.

As a result of the Subcommittee's examination of the accessibility of buildings under federal jurisdiction, Recommendation 3 of the 'Accessibility for All' recommended:

The Subcommittee recommends that the Department of Public Services and Procurement Canada establish in 2005 an ongoing audit program of the compliance of federal buildings with technical standard CAN/CSA-B651-04, as formulated by the Canadian Standards Association. A progress report should be tabled in 2007, and all federal buildings must be audited by no later than 2009.

In its formal response to the Subcommittee, PSPC stated:

*Public Services and Procurement Canada (PSPC) is developing an auditing strategy, electronic database system, and training tools, to establish a program to audit the accessibility of all its facilities, both owned and leased. The audit program will simultaneously follow twin tracks. Firstly, it will audit for compliance with the Treasury Board Accessibility Policy. Secondly, it will audit for compliance with the Canadian Standards Association's technical standard, CAN/CSA-B651-04 Accessible Design for the Built Environment. The federal government is the only jurisdiction in Canada, so far, to adopt this rigorous standard.*

*The approach PSPC has chosen for its audit program will help identify gaps between the requirements of Treasury Board policy and the 2004 version of*

*CAN/CSA-B651-04, and provide valuable information for future investments in renovations and acquisitions. A further benefit of the audit will be the opportunity to optimize the department's monitoring and reporting on accessibility within its inventory.*

*The audit program will comply with, and be guided by, the Treasury Board Accessibility Policy. PSPC will work with Social Development Canada to ensure that the offices of the latter and its Ministers are among the first public spaces to be audited for accessibility. A progress report on the audit program will be tabled by December 2007, for completion by December 2009.*

Consequently, the objective of this accessibility audit is to:

Identify any remaining accessibility improvements required in order to bring the base building elements of the facility in compliance with the *Accessibility Requirements* of the Treasury Board *Accessibility Standard for Real Property* and the CAN CSA B651 95 Barrier-Free Design Standard.

Identify the incremental improvements required in order to bring the base building elements of the facility in compliance with the *Accessibility Requirements* of the Treasury Board *Accessibility Standard for Real Property*, and the CAN CSA B651 12 Accessible Design for the Built Environment Standard.

Identify the Class C construction Costs associated with compliance with each of the above.

Document facilities and areas exempted from the requirements of Treasury Board *Accessibility Standard for Real Property* and the rationale supporting the exemptions.

## **1.1 Federal Accessibility Standards**

The current policy regulating accessibility to federal facilities is identified in the Treasury Board of Canada *Accessibility Standard for Real Property (ASRP)*, which replaced the 1998 *Treasury Board Real Property Accessibility Policy* on November 1, 2006. For reference purposes, a copy of the ASRP has been included as Appendix A of this document.

Section 5 of the ASRP, *Accessibility Requirements*, provides a detailed 'scoping' of accessibility requirements for federal real property, and these requirements have been included under the headings for the various base building and/or site elements audited in this study.

Section 5.2 of the ASRP also specifies the use of the Canadian Standards Association B651 Standard as the technical reference for accessibility, and PSPC's 1990-1995 Accessibility Program resulted in upgrading of its inventory of Crown Owned and Leased inventory to comply with the *CAN/CSA B-651-M90* and *CAN CSA B651 95* editions of the *Barrier-Free Design Standard*. Although amendments between the M90 and 95 editions of the standard were

relatively minor, the standard was superseded in 2012 by the *CAN CSA B651 12 Accessible Design for the Built Environment* standard.

In March, 1992, the Accessibility Office, PWC Headquarters issued an Accessibility Evaluation Guide that identifies various 'Assessment Considerations' for existing installations that vary slightly from the technical requirements identified in CAN CSA B651 and do not compromise effective use by persons with disabilities. These have been noted where applicable. While the Accessibility Evaluation Guide contains additional Assessment Considerations in addition to those identified in this report, those that have been problematic or open to interpretation have not been referenced in this document. Note also that these Assessment Considerations are not intended for application in new construction, which should be designed fully in accordance with the requirements of the CAN CSA B651.

## 2.0 FACILITY OVERVIEW

Facility Name:	Insert
Municipal Address:	Insert
Crown-Owned or Leased:	Insert
PSPC Asset Number:	Insert
PSPC Cost Centre Number(s):	Insert
Total Rentable Area (m2):	Insert
Building Height (Storeys):	Insert
Total Parking:	Insert
Date of Construction and major capital Improvements:	Insert
Client Departments in Facility/Floor Location:	Insert
Service/utility areas not audited:	Insert

## 3.0 WALKWAYS

### **Accessibility Requirements of the Treasury Board *Accessibility Standard for Real Property*:**

5.1. *In the management of real property, custodians shall at a minimum, provide access to and use of the following:*

c) *Public areas (including, but not limited to.... walkways);*

*k) Accessibility shall include routes from accessible parking areas, local public transit stops and all drop-off areas that are within the limits of the federal property to main entrances.*

### **3.1 Existing Conditions**

#### **Reference Checklists:**

Accessibility Checklist B - Passenger Pick-Up Areas

Accessibility Checklist C - Curb Ramps

Accessibility Checklist D - Accessible Routes

Accessibility Checklist E - Ramps and Platform Lifts

Accessibility Checklist I - Stairs and Stairwells

#### **Overview of Accessibility Elements to Review**

As PSPC has limited control over provincial municipal jurisdictions, the following are to be examined within the property limits of the facility being audited:

Walkways: Width, gradient, thresholds, gratings in circulation routes, curb ramps.

Exterior Stairs: Tread configuration (rise, run, nosing design), slip-resistance and colour-contrast of nosings, handrails (profile, extensions, returns).  
While CSA requires detectable warning surfaces, no national standard has been developed and this work should be deferred until there is an established national standard.

Exterior Ramps: Ramp width, gradient, landings, handrails (profile, extensions, returns, wall clearances, etc), protective edges, etc.

### **3.2 Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard**

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation. For new interventions to be installed or constructed, detail as per CAN CSA B651 12.

### **3.3 Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment**

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation.

The primary differences between the CSA 95 and 04 Standards are:

#### **Exterior Walkways**

Increase of minimum width of exterior walkways to 1500 mm (CSA 95: 1200 mm minimum).

#### **Curb Ramps**

Requires curb ramps to have detectable hazard indicators (CSA 95: colour and texture contrasted only)

#### **Stairs/Ramps**

Requirement for extension of handrails for the perimeter of stair landings (CSA 95: 300 mm extensions beyond top of stairs, 300 mm extensions plus one tread depth beyond base of stairs).

Change of handrail heights from 860-920 mm (CSA 95: 800-920 mm).

Requirement for ramp handrails to colour contrast with their surroundings (CSA 95: not identified).

Colour contrast of horizontal face of stair nosings to be 50  $\pm$ 10 mm deep (CSA 95: not specified)

Ramps to have colour contrasted strips 50  $\pm$ 10 mm deep at top, base and landings (CSA 95: not specified)

## **4.0 PARKING**

### **Accessibility Requirements of the Treasury Board Accessibility Standard for Real Property:**

*5.1. In the management of real property, custodians shall at a minimum, provide access to and use of the following:*

*j) Where employee or visitor parking is provided, the quantity of accessible parking spaces provided shall conform with municipal by-laws or the following table, whichever has the higher number of accessible spaces:*

<b>Total parking spaces</b>	<b>Minimum No. of accessible spaces</b>	<b>Total parking spaces</b>	<b>Minimum No. of accessible spaces</b>
<i>up to 25</i>	1	<i>151-200</i>	6
<i>26-50</i>	2	<i>201-300</i>	7
<i>51-75</i>	3	<i>301-400</i>	8
<i>76-100</i>	4	<i>401-500</i>	9
<i>101-150</i>	5	<i>more than 500</i>	<i>2% of total</i>

*Accessible parking spaces shall be within a reasonable and safe proximity of the federal facility but may be distributed among distinct parking areas.*

#### **4.1 Existing Conditions**

##### **Reference Checklists:**

Accessibility Checklist A - Car & Van Parking

##### **Overview of Accessibility Elements to Review**

Parking: Quantity (see above), width, access aisles, signage and pavement markings, proximity to accessible entrance(s), headroom clearances

#### **4.2 Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard**

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation. For new interventions to be installed or constructed, detail as per CAN CSA B651 12.

#### **4.3 Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment**

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation.

### **5.0 BUILDING ENTRANCES**

##### **Accessibility Requirements of the Treasury Board Accessibility Standard for Real Property:**

*5.1. In the management of real property, custodians shall at a minimum, provide access to and use of the following:*

*a. Entrances. Frequently used points of access to the property must be equipped with a power door operator at main entrances to real property. Where entry to or exit from the*

*facility is through a series of doors in a vestibule-like arrangement, at least one complete set of doors allowing access to the vestibule area shall be so equipped.*

### **PSPC Assessment Considerations:**

Where fixed building constraints preclude the modification of a ...vestibule (i.e., to provide sufficient manoeuvring space at doors or adequate space between two doors in series), automatic door openers prove to be a relatively low cost solution.

*Where vestibules or privacy screens restrict manoeuvring space, doors can sometimes be removed for easy access as long as privacy is not inhibited.*

## **5.1 Existing Conditions**

### **Reference Checklists:**

Accessibility Checklist F - Entrances

Accessibility Checklist G - Doors

Accessibility Checklist O - Millwork

Accessibility Checklist P - Secure Areas

### **Overview of Accessibility Elements to Review**

Existing buildings:	Power operators for accessible main entrance and related vestibule doors.
Powered entrance doorways:	Clear width, vestibule depth (doors in series)
Non-powered entrances:	Clear width, vestibule depth, door hardware, door closer forces, clearances on push and pull side of doors, threshold heights.
Base Building Security Desks	Desk height, cane detectability

Note: Identify issues related to exterior stairs and ramps, including those to entrances, under 3.0 Walkways and any interior stairs and ramps under 6.0 Vertical Movement.

## **5.2 Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard**

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation. For new interventions to be installed or constructed, detail as per CAN CSA B651 12.

## **5.3 Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment**

Describe in sufficient detail, including quantities and locations, for cost estimator

and to formulate scope of work for implementation.

The primary differences between the CSA 95 and 04 Standards are:

## **Doorways**

Clear width of doorways to be measured to edge of any panic hardware (CSA 95: measured face of stop to face of door)

Bottom edge of glazing in doorways not to exceed 900 mm (CSA 95: not mandatory).

Power door controls to be minimum 25 x 75 mm in size, between 800-1200 mm in height, located in the path of travel and clear of door swings. (CSA 95: not specified)

Thumb latch door hardware specified as not acceptable (CSA 95: not specified)

Specifies power doors are to remain open for a minimum of 5 seconds (CSA 95: not specified).

Secure Areas

**Requirements for Access Systems Card Access, Keypads and Security Gates (CSA 95: not specified).**

## **6.0 VERTICAL MOVEMENT**

**Accessibility Requirements of the Treasury Board *Accessibility Standard for Real Property*:**

*5.1. In the management of real property, custodians shall at a minimum, provide access to and use of the following:*

*b) passenger elevators;*

In addition to the above ASRP requirement, PSPC generally includes platform lifts, ramps and open circulation stairs related to internal routes of travel.

### **PSPC Assessment Considerations:**

#### Elevators

*Undersized elevator cabs need not be replaced unless they cannot provide the required 1200 mm depth required for a person in a wheelchair to pull in. If there are two identical control panels, only one need be modified to be accessible.*

### **Additional PSPC Assessment Considerations:**

#### Elevators:

*As handrails in elevator cabs are utilized for stabilization purposes only, existing handrails are left as is. Since the BFDS requires handrails on all non-access walls, new handrails are installed where they are not yet provided on all non-access walls and any existing handrail(s) are replaced to match.*

## 6.1 Existing Conditions

### Reference Checklists

Accessibility Checklist E - Ramps and Platform Lifts

Accessibility Checklist H - Elevators

Accessibility Checklist I - Stairs and Stairwells

### Overview of Accessibility Elements to Review

*Note: Auditing of enclosed exit stairs is not required as ASRP does not reference emergency egress or areas of refuge.*

Elevators: Compliance with Appendix C of the BFDS in terms of cab size, height of hall call buttons, control panels, emergency telephones and lanterns, audible and visual signalling, tactile markings on controls, automatic door reopening devices, tactile floor designation signage, handrails on all non-access walls, etc.

Platform Lifts: Compliance with CAN/CSA B355

Interior Circulation Stairs (excludes enclosed exit stairwells): Tread configuration (rise, run, nosing detail), slip-resistance and colour-contrast of nosings, handrails (profile, extensions, returns).

Interior Ramps: Ramp width, gradient, landings and handrails (profile, extensions, returns, wall clearances, etc) protective edges, etc.

Note: Identify issues related to any exterior stairs and ramps, including those to entrances under 3.0 Walkways.

## 6.2 Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation. For new interventions to be installed or constructed, detail as per CAN CSA B651 12.

## 6.3 Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation.

The primary differences between the CSA 95 and 04 Standards are:

### **Interior Circulation Stairs/Ramps**

Requirement for extension of handrails for the perimeter of stair landings (CSA 95: 300 mm extensions beyond top of stairs, 300 mm extensions plus one tread depth beyond base of stairs).

Change of handrail heights from 860-920 mm (CSA 95: 800-920 mm).

Requirement for ramp handrails to colour contrast with their surroundings (CSA 95: not identified).

Colour contrast of horizontal face of stair nosings to be 50  $\pm$ 10 mm deep (CSA 95: not specified)

Ramps to have colour contrasted strips 50  $\pm$ 10 mm deep at top, base and landings (CSA 95: not specified)

### **Elevators**

**Auditor Note: As the new elevator requirements require controls to be between 890-1220 mm for elevators serving less than 16 openings, consider that this would likely require full replacement of control panels anyway.**

Minimum door/ cab size dimension (CSA 95: 910 mm door: 1725 mm wide, 1295 mm deep with 1370 mm mm deep to face of door)

Centred 1065\* mm door: 2030 mm wide, 1295 mm deep with 1370 mm deep to face of door

Side (off centered) 915\* mm door: 1725 mm wide, 1295 mm deep with 1370 mm deep to face of door

Any 915\* mm door: 1370 mm wide, 2030 mm deep with 2030 mm deep to face of door

Any 915\* mm door: 1525 mm wide, 1525 mm deep with 1525 mm deep to face of door

\* permits -16 mm tolerance

**Auditor Note: For undersized elevator cabs, consider:**

**-wheelchair footprint (CSA: 750 mm x 1200 mm)**

**-supplementary features (mirrors on backwalls to assist access /egress)**

**-alternative regulatory requirements such as the 890 mm width and 1370 mm depth acceptable for Limited Use/Limited Access (LULA) elevators.**

Door reopening devices

Permits contact to be made before door reopening device is activated (CSA 95: no contact permitted).

Door timing for hall or car call

For hall calls, a minimum of 5 seconds is required between the time the door starts to open to the time it starts to close (CSA 95: 4 seconds).

Hall Call buttons

Extends height range for hall call buttons to 890-1220 mm (CSA 95:1070 mm  $\pm$  25 mm)

Buttons or surrounding collar required to be raised a minimum of 1.5 mm (CSA 95: raised, flush or recessed)

'Up' hall call button to be above 'Down' button (CSA 95: not specified)

Clear floorspace of 760 mm by 1220 mm required at call buttons (CSA 95: not specified)

Objects below hall call buttons not to protrude more than 25 mm (CSA 95: not specified)

Hall buttons to be a minimum of 19 mm in smallest direction (CSA 95: 20 mm).

Car Controls

Clear floorspace of 760 mm by 1220 mm required at car controls (CSA 95: not specified)

Height of car controls to be between 890-1220 mm where elevator serves less than 16 openings (CSA 95: 890-1370 mm). Elevators serving more than 16 openings remain at 890-1370 mm.

Buttons or surrounding collar required to be raised a minimum of 1.5 mm (CSA 95: raised flush or recessed).

Buttons are to be arranged in either standard telephone style keypad or with numbers in ascending order. When 2 or more columns of buttons are provided, they are to read left to right (CSA 95: not specified).

Buttons to be identified by tactile characters and Braille only except where arranged in a standard telephone keypad arrangement (CSA 95: tactile characters only).

Raised star provided immediately left of the button for the main entry level (CSA 95: not required)

### Car Position Indicators

Requires both audible and visible car floor location indicators (CSA 95: visible only)

Audible signals to sound once for the 'Up' direction or twice for the 'Down' direction or alternatively be verbal stating the word 'Up' or 'Down' (CSA 95: optional to include audible signal only as car passes or stops at a floor)

Audible signal or verbal annunciator to be 10 db above ambient to a maximum of 80 db (CSA 95: audible signal of minimum of 20 db)

#### Hall or in-car signals

Requires visible and audible signaling at each hoistway to indicate which car is answering a call and the direction of travel (CSA 95: car answering call only). In car signals that are visible from the floor area adjacent to the call buttons.

Audible signals to sound once for the 'Up' direction or twice for the 'Down' direction or alternatively be verbal stating the word 'Up' or 'Down' (CSA 95: optional to include audible signal only as car passes or stops at a floor)

Audible signal or verbal annunciator to be 10 db above ambient to a maximum of 80 db (CSA 95: audible signal of minimum of 20 db)

### Floor Designation Signage

Floor designations to consist of raised characters and braille designations (CSA 95: braille not required)

Raised designations a minimum of 0.8 mm high (CSA 95: 0.75 mm high)

Mounting height is 1525 mm to the baseline of the character (CSA 95: centered at 1500 mm  $\pm$  25 mm)

Raised star provided immediately left of the floor designation at the main entry level (CSA 95: not required)

### Emergency Communications

If emergency communications device is in a closed compartment, the door hardware is to be operable with one hand, not require tight grasping pinching or twisting of the wrist and not require greater than 22 N to activate operable parts (CSA 95: not specified).

Requires emergency signaling devices not only to be limited to voice communication. If instructions for use are provided, essential information is to be provided in both tactile and visual form.

### LULA (Limited Use Limited Access) Elevators

New allowance for LULA elevators

Cab size minimum of 1060 mm width by 1370 mm depth with clear width door opening of 815 mm.

## 7.0 INTERIOR DOORS AND CORRIDORS (Base Building)

### **Accessibility Requirements of the Treasury Board *Accessibility Standard for Real Property*:**

5.1. *In the management of real property, custodians shall at a minimum, provide access to and use of the following:*

e) *interior doors and corridors;*

## 7.1 Existing Conditions

### **Reference Checklists:**

Accessibility Checklist D – Accessible Routes

Accessibility Checklist G - Doors

### **Overview of Accessibility Elements to Review**

Doorways: Clear width, door hardware, door closer forces, clearances on push and pull side of doors, height of transparent glazing in doorways etc.

Corridors: Width, slip resistance, carpeting, level changes between adjoining floor materials, protruding objects that are cane detectable, headroom clearances, floor grates, etc.

Operating Mechanisms<sup>2</sup>: Height of light switches, electrical outlets, buzzers, access telephones, card access devices.

Note: Identify issues related to any interior stairs and ramps under 6.0, Vertical Movement.

## 7.2 Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation. For new interventions to be installed or constructed, detail as per CAN CSA B651 12.

### 7.3 Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation.

The primary differences between the CSA 95 and 04 Standards are:

#### Doorways

Clear width of doorways to be measured to edge of any panic hardware (CSA 95: measured face of stop to face of door)

Bottom edge of glazing in doorways not to exceed 900 mm (CSA 95: not mandatory).

Power door controls to be minimum 25 x 75 mm in size, between 800-1200 mm in height, located in the path of travel and clear of door swings.

Thumb latch door hardware specified as not acceptable (CSA 95: not specified)

Specifies power doors are to remain open for a minimum of 5 seconds (CSA 95: not specified).

#### Corridors

Headroom clearance increased to 2030 mm minimum (CSA: 1980 mm minimum)

## 8.0 WASHROOMS

### Accessibility Requirements of the Treasury Board *Accessibility Standard for Real Property*:

5.1. *In the management of real property, custodians shall at a minimum, provide access to and use of the following:*

f) *Washrooms*

### PSPC Assessment Considerations:

*One accessible male washroom and female washroom, or alternatively one accessible individual washroom, is required on each floor in existing buildings based on the ASRP 5.2 'Note: This technical standard ... does not apply retroactively to accessibility requirements of real property in the inventory prior to October 1, 2004'.*

*Only one lavatory per washroom has to be accessible.*

*Where fixed building constraints preclude the modification of a washroom vestibule (i.e., to provide sufficient manoeuvring space at doors or adequate space between two doors in series), automatic door openers prove to be a relatively low cost solution.*

*Where vestibules or privacy screens restrict manoeuvring space, doors can sometimes be removed for easy access as long as privacy is not inhibited.*

*If the toilet was installed with its centerline located at 430 mm from the wall carrying the grab bar...it need not be moved.*

*Flush controls that are not on the transfer side of the toilet need not be relocated.*

*Where existing urinals do not meet the CAN/CSA B651 requirements, they do not have to be replaced if toilet fixtures are available in accessible stalls.*

## 8.1 Existing Conditions

### Reference Checklists:

Accessibility Checklist G - Doors

Accessibility Checklist J - Washrooms

Accessibility Checklist K - Individual Washrooms>Showers

### Overview of Accessibility Elements to Review

#### Main Core Washrooms:

Entrance Doorway:	Clear width, door hardware*, door closer forces*, clearances on push and pull side of doors*, etc.
Sink:	Height, kneespace/circulation clearances, faucet controls, mirror, soap/wastepaper dispensers heights, etc.
Stall:	Stall size, stall door (see above), locking devices, coat hook, etc.
Toilet:	Seat height, centerline distance, backrest, grab bars, paper dispensers, etc.
Urinal:	Circulation clearances, well openings, grab bars, etc. Asa urinals were not in the 1995 standard, urinal upgrading would be for compliance with 2004 Standard only.

\*Power operation of a washroom entrance door will generally compensate for the non compliance of these items.

#### Individual Washroom:

Room size, circulation clearance between sink/toilet, shelf, light switch/outlet height(s), etc. See also Entrance Doorway, Sink and Toilet headings above.

#### Showers:

Circulation clearances, stall size, thresholds, grab bars, controls, head, etc.

While RPA does not identify a specific a requirement for access to showers, showers not provided for operational purposes can be considered a staff amenity and should be accessible.

#### Note:

Where structural, architectural and/or fixture count limitations prohibit modification of existing main core washrooms, the installation of a separate accessible individual washroom is generally a more cost-effective solution.

## 8.2 Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation. For new interventions to be installed or constructed, detail as per CAN CSA B651 12.

## 8.3 Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation.

The primary differences between the CSA 95 and 04 Standards are:

Increase in size of toilet stalls to 1600 mm wide by 1500 mm deep (CSA 95: 1500 mm by 1500 mm).

Requirement for a clear floor area of 1500 mm by 1500 mm outside of the doors for accessible stalls (CSA 95: 1200 mm by 1200 mm).

**Auditor Note: If the two points above cannot be achieved in an existing washroom, an accessible individual washroom will be required in an alternate location.**

Description of requirements for accessible urinals (CSA 95: urinals not included). Although only one urinal is required to be accessible to persons using wheelchairs, all urinals in washrooms would require raised vertical markers. **Auditor Note: For floors with multiple washrooms, locate the accessible urinal in the male washroom which also contain the accessible toilet stall. If the required solution is an accessible individual washroom, exclude the requirement for a urinal.**

Lowering of maximum height of coat hooks in accessible stalls to 1200 mm (CSA 95:1400 mm maximum)

Requirement for D-pulls outside of doors to be horizontally mounted (CSA 95: vertical)

Soap dispensers to be no more than 1100 mm high (CSA 95: 1200 mm) and within 500 mm reach from the lavatory (CSA 95: not specified).

Clarification of kneespace clearance under sinks at end walls to be centred on sink (eg. 920 mm width required where at end wall)

Clarification that tilt mirrors are not recommended (CSA 95: not specified)

Addition of 1000 mm long horizontal grab bar at entrance to roll-in showers (CSA 95: not required) and increase in length of the same bar at entrances to showers with a fold-down seat (CSA 95: 750 mm long). Increase in length of the grab bar on the rear wall of roll in showers to 1000 mm (CSA 95: 900 mm minimum).

## 9.0 DRINKING FOUNTAINS

### **Accessibility Requirements of the Treasury Board *Accessibility Standard for Real Property*:**

5.1. *In the management of real property, custodians shall at a minimum, provide access to and use of the following:*

*h) Drinking fountains. One accessible cooler or fountain shall be provided in each location where water coolers or drinking fountains are provided;*

#### **PSPC Assessment Considerations:**

*PSPC Standards for Leased Accommodation only require one accessible fountain per floor.*

## 9.1 Existing Conditions

### **Overview of Accessibility Elements to Review**

#### Water Coolers:

Dispenser height, operating mechanisms, cup dispensers and circulation clearances.

#### Drinking Fountains:

Spout height, operating mechanisms, circulation/ kneespace clearances and cane detectability.

## 9.2 Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation. For new interventions to be installed or constructed, detail as per CAN CSA B651 12.

## 9.3 Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation.

The primary differences between the CSA 95 and 04 Standards are:

Requires drinking fountains to colour contrast with their background

Requires fountains to be cane, detectable recessed or otherwise located outside of circulation routes

Requires user to be able to control the timing and water delivery height (eg. not electronically controlled).

## 10.0 PUBLIC TELEPHONES/TACTILE SIGNAGE

### **Accessibility Requirements of the Treasury Board *Accessibility Standard for Real Property*:**

*5.1. In the management of real property, custodians shall at a minimum, provide access to and use of the following:*

*g) public telephones. When banks of public telephones are provided, there must be at least one public telephone per bank accessible to persons in wheelchairs and one public telephone per bank accessible to persons with hearing impairments. All direct-line telephones and at least one charge-a-call telephone, when provided, shall be similarly accessible*

*Tactile signage. Tactile signs shall be provided for the following: washrooms, emergency exits, elevators, and stairwells.*

### **PSPC Assessment Considerations**

*Public telephones located in the entrance lobbies of PSPC leased facilities are generally not modified as they do not constitute part of the leased premises.*

## 10.1 Existing Conditions

### **Reference Checklists**

Accessibility Checklist M - Tactile Signage

Accessibility Checklist N - Public Telephones

### **Overview of Accessibility Elements to Review**

#### Tactile Signage:

Federal Identity Program (FIP) tactile signage installed for doors to all washrooms (accessible and non-accessible), stairwells and exits directly to the exterior. Tactile signage for elevators is generally installed to elevator manufacturers standards and is not included as part of the FIP tactile signage system.

Tactile signs are located on the latch side of doors (not on the doors) at a centreline height of 1500 mm.

#### Public/Direct Line Telephones

Height, directory/TDD shelves, flux coil volume control devices for handsets, circulation clearances, accessibility of location.

## 10.2 Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation. For new interventions to be installed or constructed, detail as per CAN CSA B651 12.

## 10.3 Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation.

The primary differences between the CSA 95 and 04 Standards are:

Lowering of public telephones for use by persons in wheelchairs to 1200 mm (CSA 95: 1370 mm).

## 11.0 PUBLIC AREAS

### **Accessibility Requirements of the Treasury Board *Accessibility Standard for Real Property*:**

*5.1. In the management of real property, custodians shall at a minimum, provide access to and use of the following:*

*c) Public areas (including, but not limited to, cafeterias, lounges, recreation areas, eating areas, patios, libraries, and walkways);*

*l) Accessible seating spaces shall be provided within auditoriums, theatres, and other general assembly areas in conformance with the quantities identified in the National Building Code of Canada.*

*m) Classrooms, auditoriums, meeting rooms and theatres with an area of more than 100 square metres shall be equipped with an assistive listening system encompassing the entire seating area.*

## 11.1 Existing Conditions

**If this section is not applicable (eg. There are no base building exterior amenity areas, cafeterias, eating or assembly areas etc. related to the facility), state so but do not delete.**

### **Reference Checklists:**

Accessibility Checklist D - Doors

Accessibility Checklist G- Accessible Routes

## Accessibility Checklist O - Millwork

### Overview of Accessibility Elements to Review

Exterior Amenity Areas (eg. recreation areas, patios, terraces, etc. within the limits of the federal property)

Site Furnishings: Placement in relation to accessible routes.  
Benches: Seat height backs, armrests.  
Picnic Tables: Height, kneespace clearances

#### Cafeterias:

Entrance Doorway: Clear width, door hardware<sup>1</sup>, door closer forces<sup>1</sup>, clearances on push and pull side of doors<sup>1</sup>, etc.

Circulation: Width of checkout lanes, corridors to seating areas,  
Height of/reach to servery shelves, self-serve cabinets/ coolers and vending machines<sup>2</sup>.

#### Assembly Areas

Entrance Doorway: Clear width, door hardware<sup>1</sup>, door closer forces<sup>1</sup>, clearances on push and pull side of doors<sup>1</sup>, etc.

Accessible Seating Quantity (see above), size, access aisles.

#### Access to Stages

Assistive listening systems for base building, auditoriums, conference rooms, theatres, etc. over 100 square meters. A portable system is a cost effective alternative to hard wiring a new system.

- 1 Power operation of entrance doors will generally compensate for the non-compliance of these items.
- 2 Height/reach issues can often be addressed by ensuring the same selection of food beverages are provided at accessible lower level shelves.

## 11.2 Modifications Required to Comply with CAN CSA B651 95 Barrier-Free Design Standard

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation. For new interventions to be installed or constructed, detail as per CAN CSA B651 12.

### 11.3 Incremental Modifications Required to Comply with CAN CSA B651 12 Accessible Design for the Built Environment

Describe in sufficient detail, including quantities and locations, for cost estimator and to formulate scope of work for implementation.

The primary differences between the CSA 95 and 04 Standards are:

Requirement for line up guides in cafeterias to

- have clear floor area of 1500 mm by 1500 mm at start, end and changes in direction.
- be stable and not move easily
- be cane detectable at or below 680 mm
- colour contrast with surroundings

Changes height range for accessible tables to 730-860 mm (CSA 95: 810-860 mm)

### 12.0 BUILDING EXEMPTIONS

With regards to exempting all or parts of facilities from accessibility requirements, the Accessibility Standard for Real Property includes the following reference:

#### *Exemptions and Minor Variations*

*5.5. Certain elements of real property may be exempted from the full accessibility requirements unless the intended use requires public access or the job requirements are such that a person with a disability could meet these requirements. Custodians shall establish internal procedures for identifying and seeking the deputy head's approval of full or partial exemptions from the accessibility requirements of this standard. They shall document the rationale for these exemptions and maintain records of all real property that is partially or fully exempted in accordance with this standard.*

*5.6. If the criteria that justified the exemption change, the custodian shall reassess the real property against this standard to ensure that the exemption is still justified.*

*5.7. Custodians may allow minor variations from the accessibility requirements of this standard (including the technical standard). However, such variations shall be consistent with the general intent of this standard and shall not affect the general accessibility of a specific property.*

*5.8. Where the accessibility requirements of this standard will significantly reduce the heritage quality of the property, some deviation from this standard is permitted. In deviating from the standard, custodians shall ensure that the following requirements are met:*

- a. access shall be provided to at least one main level of the building;*
- b. there shall be full access to government services and employment opportunities;*
- c. where washroom facilities are provided in an inaccessible location, equivalent facilities that are accessible shall also be provided; and*
- d. for inaccessible exhibitions, another version of the exhibition, such as a video display, shall be provided in an accessible area.*

In response to 5.2 above, PSPC has adopted the exemption criteria identified in the 1998 Real Property Accessibility policy (eg. which preceded the current Accessibility Standard for Real Property) for the purposes of formalizing exemptions under the 2005-2009 Audit Program.

*Various new buildings or structures, due to their specialized design function or requirements, may be candidates for a reduced level of accessibility or can be completely exempted from barrier-free design requirements. Such facilities include, but are not limited to, the following:*

1. ***Naturally inaccessible facilities in remote locations***  
This would include, for example, mountain top installations not accessible by vehicles, facilities on islands not served by accessible ferry systems, below-grade excavations not serviced by elevators, etc.
2. ***Unattended monitoring stations***  
This would include facilities which are not occupied on a full time-basis such as:  
-facilities housing monitoring/test/experimental equipment or instrumentation which are monitored on an intermittent basis.  
-lookout/observation towers.
3. ***Facilities designed and constructed to accommodate able-bodied personnel (i.e where being able-bodied is a specific part of the job requirement)***  
This would include such facilities as guardhouses, service garages, utility buildings, warehouses, processing plants etc. Offices and support functions provided for the sole use of the able-bodied staff located in these facilities can also be exempted.
4. ***Facilities where operational requirements preclude reasonable access by persons with disabilities***  
This could include facilities where immediate evacuation is required in the event of an accident. See also **Hazardous Occupancies** and **Facilities designed and constructed to accommodate able-bodied personnel**.
5. ***Hazardous Occupancies***  
*In some cases, access need not be provided to certain parts of a facility such as boiler rooms, roofs, elevator pits, elevator penthouses, mechanical rooms, electrical vaults, piping or equipment catwalks, or areas of hazardous occupancy (as defined by the National Building Code of Canada and the National Fire Code of Canada), unless the intended use requires public access or the job requirements are such that a person with a disability could meet these requirements.*

Based on the definitions of the National Building Code of Canada, this would include the following:

*-high hazard industrial occupancy means an industrial occupancy containing sufficient quantities of highly combustible and flammable or explosive materials which, because of their inherent characteristics, constitute a special fire hazard.*

*-medium hazard industrial occupancy means an industrial occupancy containing in which the combustible content is more than 50 kg/m<sup>2</sup> or 1200 MJ/m<sup>2</sup> of floor area and not classified as high hazard industrial occupancy).*

6. ***No barrier free access is required to the second storey of a two-storey building if the second storey is less than 600 m<sup>2</sup> rentable and there is full access to government services and employment opportunities on the ground floor. The same provisions apply to single-storey buildings where the basement is used as an operational second floor.***

This would include facilities where, for example, government services, offices and employee amenities (meeting rooms, kitchenettes, photocopy and business machine areas, etc.) are already located on an accessible Ground Floor and the second storey and/or basement level is less than 600 m2 rentable and consists of private offices only. Where a person in a wheelchair is located on an accessible ground floor, staff that supervises or is supervised by, this person should be co-located on the same floor.

**7. Facilities to be permanently vacated or removed from federal inventory within one year**

This would include facilities which, for example, are to be vacated dispose of, demolish, decommission or otherwise within the course of the 2005 to 2009 audit program. While RPA identifies a one year term, take into consideration planning, design and implementation time frames.

**12.1 Recommended Exemptions**

The following parts of the facility are identified for exemptions under the Accessibility Standard for Real Property and were therefore not examined in this accessibility audit:

List areas of the facility not audited, adding/deleting as required.

*Janitors closets, mechanical, electrical and telecommunications rooms, janitors closets, loading docks, long-term 'dead' storage areas at Basement level, etc.*

*For facility exemptions under headings 5.4 and .1 to .6 above, insert description and submit to PSPC Portfolio Management for formal exemption through the PSPC **Best Practice on Accessibility: Exemption Criteria and Approval Process.***

Example:

This audit did not include review of the 3rd and 4th<sup>th</sup> Floor of the General Records Centre as these floors consist of long-term document storage only (eg. on 3 meter high pallet system) only and all offices and amenities for staff responsible for working on these floors are located on the Ground and 2<sup>nd</sup> Floor.

This recommendation is based on the considerations for *Facilities designed and constructed to accommodate able-bodied personnel (i.e where being able-bodied is a specific part of the job requirement)* and *Facilities where operational requirements preclude reasonable access by persons with disabilities*

**13.0 ACCESSIBILITY COMPLIANCE SCORE**

**13.1 Existing Compliance with B651 95  
(Simply fill in the score and the calculation is automatic /compléter simplement la colonne C, le calcul est automatique)**

**% Compliance of Asset =  $\frac{\text{Total D}}{400}$**

Scoring \*

4 = Full compliance: Fully meets Treasury Board Accessibility Standard for Real Property (ASRP) and CAN/CSA B651 technical requirements or PSPC acceptable technical variances.

- 3.5 = Excellent: Requires minor adjustment of existing elements to comply with ASRP and CAN/CSA technical requirements (signs/ accessories/grab bar relocations, maintenance items, painting, etc.).
- 3 = Very Good: Requires replacement of existing elements to comply with ASRP and CAN/CSA technical requirements (signs/ accessory installations, new controls for existing door operators, new grab bars, etc.).
- 2.5 = Good: Requires installation of new element to comply with ASRP and CAN/CSA technical requirements (installation of power door operators, grab bars, elevator control panels, etc.).
- 2 = Moderate: Requires minor architectural/structural or mechanical interventions to comply with ASRP and CAN/CSA technical requirements (modification of ramps, reconfiguration of accessible stalls, replacement of elevator panels, lowering of drinking fountains, etc.).
- 1.5 = Poor: Requires major architectural/structural or mechanical interventions to comply with ASRP and CAN/CSA technical requirements (extension of ramps, reconfiguration of washrooms, replacement of elevator cabs, replacement of drinking fountains, etc.).
- 1 = Very Poor: Requires construction of new accessibility elements to meet ASRP or CAN/CSA technical requirements (construction or installation of new ramps, washrooms, lifts/elevators, drinking fountains, etc.).
- 0 = ASRP Accessibility elements cannot be accommodated due to architectural, structural or other limitations.

If a particular accessible element is not applicable to a specific building (for example, single storey building with no elevators, no public telephones, etc.), assign a full score for that specific element. This approach is to avoid the need to redistribute the scoring to the other accessible elements.

## 13.2 Existing Compliance with B651 12

**(Simply fill in the score and the calculation is automatic)**

$$\% \text{ Compliance of Asset} = \frac{\text{Total D}}{400}$$

Scoring \*

- 4 = Full compliance: Fully meets Treasury Board Accessibility Standard for Real Property (ASRP) and CAN/CSA B651 technical requirements or PSPC acceptable technical variances.
- 3.5 = Excellent: Requires minor adjustment of existing elements to comply with ASRP and CAN/CSA technical requirements (signs/ accessories/grab bar relocations, maintenance items, painting, etc.).
- 3 = Very Good: Requires replacement of existing elements to comply with ASRP and CAN/CSA technical requirements (signs/ accessory installations, new controls for existing door operators, new grab bars, etc.).
- 2.5 = Good: Requires installation of new element to comply with ASRP and CAN/CSA technical requirements (installation of power door operators, grab bars, elevator control panels, etc.).
- 2 = Moderate: Requires minor architectural/structural or mechanical interventions to comply with ASRP and CAN/CSA technical requirements (modification of ramps, reconfiguration of accessible stalls, replacement of elevator panels, lowering of drinking fountains, etc.).
- 1.5 = Poor: Requires major architectural/structural or mechanical interventions to comply with ASRP and CAN/CSA technical requirements (extension of ramps, reconfiguration of washrooms, replacement of elevator cabs, replacement of drinking fountains, etc.).
- 1 = Very Poor: Requires construction of new accessibility elements to meet ASRP or CAN/CSA technical requirements (construction or installation of new ramps, washrooms, lifts/elevators, drinking fountains, etc.).
- 0 = ASRP Accessibility elements cannot be accommodated due to architectural, structural or other limitations.

If a particular accessible element is not applicable to a specific building (for example, single storey building with no elevators, no public telephones, etc.), assign a full score for that specific element. This approach is to avoid the need to redistribute the scoring to the other accessible elements.

## 14.0 CLASS C CONSTRUCTION ESTIMATE

Accessibility Standard for Real Property Requirements	CAN CSA B651-95	CAN CSA B651-04
3.0 Walkways	Insert	Insert
4.0 Parking	Insert	Insert
5.0 Building Entrances	Insert	Insert
6.0 Vertical Movement Elevators Circulation Stairs Ramps	Insert	Insert
7.0 Interior Doors and Corridors	Insert	Insert
8.0 Washrooms	Insert	Insert
9.0 Water Coolers/Drinking Fountains	Insert	Insert
10.0 Public Telephones/Tactile Signage	Insert	Insert
11.0 Public Areas	Insert	Insert
Est/Design Allowance		
Estimated Construction Cost		

*Notes:*

- 1) *Excludes GST*
- 2) *Excludes Fees*
- 3) *Excludes Project/Construction Contingencies*

### BIBLIOGRAPHY

Accessibility for All, Report of the Standing Committee on Human Resources, Skills Development, Social Development and the Status of Persons with Disabilities, June, 2005.

Accessibility Standard for Real Property, Treasury Board of Canada Secretariat, November 1, 2006

Real Property Accessibility, Treasury Board of Canada Secretariat, June 30, 1998.

CAN/CSA B651 95 Barrier-Free Design, Canadian Standards Association, September 1995.

CAN/CSA B651 12 Accessible Design for the Built Environment, Canadian Standards Association, 2012.

Accessibility Evaluation Guide, Accessibility Office, Public Works Canada, January, 1994.

Canada Labour Code, Part II: Canada Occupational Safety and Health Regulations, December 23, 1998.

## **APPENDIX A: Accessibility Standard for Real Property (November 1, 2006)**

### **ACCESSIBILITY STANDARD FOR REAL PROPERTY**

#### ***Table of Contents***

1. Effective date
2. Application
3. Context
4. Purpose
5. Accessibility requirements
6. References
7. Enquiries

#### **Accessibility Standard for Real Property**

##### ***1. Effective date***

This standard is effective November 1, 2006.

##### ***2. Application***

This standard applies to all departments within the meaning of section 2 of the *Financial Administration Act*, unless specific acts or regulations override it.

##### ***3. Context***

The *Canadian Human Rights Act* (CHRA) gives effect to the principle that all individuals should have equal opportunity to have their needs accommodated, consistent with their duties and obligations and to function as members of society, without being hindered in, or prevented from, doing so by discriminatory practices.

The *CHRA* prohibits discrimination in the provision of goods, services, facilities or accommodation customarily available to the general public and prohibits the adverse differentiation between individuals.

##### ***4. Purpose***

The Treasury Board *Policy on the Management of Real Property* holds Deputy Heads responsible for providing barrier-free access to, use of and exit from real property in accordance with this standard. This standard establishes minimum requirements for the accessibility of real property to meet the objectives of the policy.

This standard is issued pursuant to the *Financial Administration Act*, subsections 7(1), 9(1.1), 9(2) and the *Federal Real Property and Federal Immovables Act*, subsection 16(4).

## 5. Accessibility requirements

5.1. In the management of real property, custodians shall at a minimum, provide access to and use of the following:

- a. Entrances. Frequently used points of access to the property must be equipped with a power door operator at main entrances to real property. Where entry to or exit from the facility is through a series of doors in a vestibule-like arrangement, at least one complete set of doors allowing access to the vestibule area shall be so equipped.
- b. Passenger elevators.
- c. Public areas (including, but not limited to, cafeterias, lounges, recreation areas, eating areas, patios, libraries, and walkways).
- d. Federal work areas (including, but not limited to, offices, on-floor storage areas, meeting and training rooms, computer rooms and spaces for business machines).
- e. Interior doors and corridors.
- f. Washrooms.
- g. Public telephones. When banks of public telephones are provided, there must be at least one public telephone per bank accessible to persons in wheelchairs and one public telephone per bank accessible to persons with hearing impairments. All direct-line telephones and at least one charge-a-call telephone, when provided, shall be similarly accessible.
- h. Drinking fountains. One accessible cooler or fountain shall be provided in each location where water coolers or drinking fountains are provided.
- i. Tactile signage. Tactile signs shall be provided for the following: washrooms, emergency exits, elevators and stairwells.
- j. Where employee or visitor parking is provided, the quantity of accessible parking spaces provided shall conform with municipal by-laws or the following table, whichever has the higher number of accessible spaces:

<i><b>Total Parking Spaces</b></i>	<i><b>Minimum No. of Accessible Spaces</b></i>	<i><b>Total Parking Spaces</b></i>	<i><b>Minimum No. of Accessible Spaces</b></i>
<i>up to 25</i>	<i>1</i>	<i>151–200</i>	<i>6</i>
<i>26–50</i>	<i>2</i>	<i>201–300</i>	<i>7</i>
<i>51–75</i>	<i>3</i>	<i>301–400</i>	<i>8</i>
<i>76–100</i>	<i>4</i>	<i>401–500</i>	<i>9</i>
<i>101–150</i>	<i>5</i>	<i>more than 500</i>	<i>2% of total</i>

Accessible parking spaces shall be within a reasonable and safe proximity of the federal facility but may be distributed among distinct parking areas.

- k. Accessibility shall include routes from accessible parking areas, local public transit stops and all drop-off areas that are within the limits of the federal property to main entrances.
- l. Accessible seating spaces shall be provided within auditoriums, theatres and other general assembly areas in the quantities identified in the *National Building Code of Canada*.

m. Classrooms, auditoriums, meeting rooms and theatres of more than 100 square metres shall be equipped with an assistive listening system encompassing the entire seating area.

5.2. In meeting accessibility requirements for real property, departments shall apply the technical standard found in the publication entitled "Accessible Design For the Built Environment" (CAN/CSA-B651-04).

**Note:** This technical standard has applied to the accessibility requirements of real property acquired (including lease renewal), under construction or undergoing major refit since October 1, 2004. It does not apply retroactively to accessibility requirements of real property in the inventory prior to October 1, 2004.

5.3. For Crown-leased real property outside Canada, custodians shall make best efforts to meet the standard.

5.4. Departments shall adapt residential units to the technical standard when employees or their immediate dependants require accessibility.

#### **Exemptions and minor variations**

5.5. Certain elements of real property may be exempted from the full accessibility requirements unless the intended use requires public access or the job requirements are such that a person with a disability could meet these requirements. Custodians shall establish internal procedures for identifying and seeking the deputy head's approval of full or partial exemptions from the accessibility requirements of this standard. They shall document the rationale for these exemptions and maintain records of all real property that is partially or fully exempted in accordance with this standard.

5.6. If the criteria that justified the exemption change, the custodian shall reassess the real property against this standard to ensure that the exemption is still justified.

5.7. Custodians may allow minor variations from the accessibility requirements of this standard (including the technical standard). However, such variations shall be consistent with the general intent of this standard and shall not affect the general accessibility of a specific property.

5.8. Where the accessibility requirements of this standard will significantly reduce the heritage quality of the property, some deviation from this standard is permitted. In deviating from the standard, custodians shall ensure that the following requirements are met:

- a. access shall be provided to at least one main level of the building;
- b. there shall be full access to government services and employment opportunities;
- c. where washroom facilities are provided in an inaccessible location, equivalent facilities that are accessible shall also be provided; and
- d. for inaccessible exhibitions, another version of the exhibition, such as a video display, shall be provided in an accessible area.

## **6. References**

### ***Treasury Board policy instruments***

- Federal Identity Program Manual, Section 4.3b. Tactile Signage
- Management of Information Technology Standards
- Policy on the Duty to Accommodate Persons with Disabilities in the Federal Public Service
- Policy on the Management of Real Property

## **7. Enquiries**

Please direct enquiries about this standard to your departmental headquarters. For interpretation of this standard, headquarter officials should contact:  
Real Property and Materiel Policy Division

Solicitation No. - N° de l'invitation  
EZ899-173144/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
tpv028

Client Ref. No. - N° de ref. du client

File No. - N° du dossier

CCC No./N° CCC - FMS No./N° VME

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Treasury Board of Canada Secretariat  
L'Esplanade Laurier  
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Date Modified: 2006-06-26

Solicitation No. – N° de l'invitation  
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## **PUBLIC SERVICES AND PROCUREMENT CANADA REAL PROPERTY SERVICES**

### **APPENDIX B: PROJECT TEAM**

**Project Leader:** The (National) Asset and Facilities Management Directorate

**Property Manager:** Insert

**Portfolio Manager:** Insert

**Accessibility Coordinator:** Insert

**Accessibility Survey Team:** Insert

## SUBMISSION REQUIREMENTS AND EVALUATION (SRE)

### SRE 1 GENERAL INFORMATION

#### 1.1 Reference to the Selection Procedure

An 'overview of the selection procedure' can be found in General Instructions to Proponents (GI 9).

#### 1.2 Submission of Proposals

The Proponent is responsible for meeting all submission requirements. Please follow detailed instructions in "Submission of Proposals", General Instructions to Proponents (GI 10).

#### 1.3 Calculation of Total Score

For this Standing Offer the Total Score will be established as follows:

Technical Rating x 90%	=	Technical Score (Points)
<u>Price Rating x 10%</u>	=	<u>Price Score (Points)</u>
Total Score		Max. 100 Points

### SRE 2 PROPOSAL REQUIREMENTS

#### 2.1 Requirement for Proposal Format

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

1. Submit one (1) bound original plus five (5) bound copies of the proposal
2. Paper size should be - 216mm x 279mm (8.5" x 11")
3. Minimum font size - 11 point Times or equal
4. Minimum margins - 12 mm left, right, top, and bottom
5. Double-sided submissions are preferred
6. One (1) 'page' means one side of a 216mm x 279mm (8.5" x 11") sheet of paper
7. 279mm x 432mm (11" x 17") fold-out sheets for spreadsheets, organization charts etc. will be counted as two pages.
8. The order of the proposals should follow the order of the Request for Standing Offer SRE 3 section.
9. Binding - plastic cerlox or spiral wire, appropriately sized so submission can be folded back on itself without binding, falling apart or creating excessive thickness.
10. Front cover, clear plastic, each section separated with tabbed dividers.
11. Laser jet or non water soluble ink.
12. On the footer of every page, identify firm and number all pages of submission consecutively.

#### 2.2 Specific Requirements for Proposal Format

The maximum number of pages (including text and graphics) to be submitted for the Rated Requirements under SRE 3.2 is twenty-five (25) pages.

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

- Covering letter
- Declaration/Certifications Form (Appendix A)
- Integrity Provisions –Required Documentation
- Front page of the Request for Standing Offer document
- Front page of revision(s) to the Request for Standing Offer document

- Price Proposal Form (Appendix B)
- Team Identification (Appendix C)

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

### **SRE 3 SUBMISSION REQUIREMENTS AND EVALUATION**

#### **3.1 MANDATORY REQUIREMENTS**

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

##### **3.1.1 Declaration/Certifications Form**

Proponents must complete, sign and submit the following:

- A. Appendix A, Declaration / Certifications Form as required.

##### **3.1.2 Licensing, Certification or Authorization**

The Proponent shall be authorized to provide Engineering or Architectural Services and must include an Architect, Electrical Engineer, Mechanical Engineer, Structural Engineer, Vertical Transportation Specialist, and a Cost Consultant, licensed, or eligible to be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial or territorial law in the province of British Columbia/Yukon. If the Proponent is licensed to practise in only one of the two provinces then that Proponent must be eligible and willing to be licensed in the province in which they are not licensed.

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

##### **3.1.3 Consultant Team Identification**

The consultant team to be identified must include the following:

Proponent (prime consultant)	Architect or Engineer
Key Sub-consultants	Architect Mechanical Engineer Electrical Engineer Structural Engineer
Specialists	Vertical Transportation Specialist Cost Specialist

Information required: name of firm, key personnel to be assigned to this Standing Offer. For the prime consultant and key sub-consultants/specialists indicate current license as applicable and/or how you intend to meet the provincial licensing/membership requirements. In the case of a joint venture identify the existing or proposed legal form of the joint venture (refer to General Instructions - Limitation of Submissions).

##### **3.1.4 Integrity Provisions – Required documentation**

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

### 3.2 RATED REQUIREMENTS

Proposals meeting the mandatory requirements will be evaluated in accordance with the following criteria. The clarity of the proposal writing will form part of the evaluation (use of language, document structure, conciseness and completeness of the response):

#### 3.2.1 Team Approach / Management of Services

1. What we are looking for:  
How the team will be organized in its approach and methodology in the delivery of the Required Services and how committed they are to honouring deadlines.
2. What the Proponent should provide: recommended two (2) pages  
A description of:
  - a) Roles and responsibilities of key personnel;
  - b) Assignment of the resources and availability of back-up personnel;
  - c) Management and organization (reporting structure);
  - d) Description of the firm's approach to responding to the individual call-ups which will arise as a result of this standing offer;
  - e) Quality control techniques;
  - f) Demonstration of how the team intends to meet the 'Project Response Time Requirements' which is 48 hours after reserve number assignment and 10 days after contract award;
  - g) Demonstration of how the team intends to rectify the situation of a missed deliverable deadline or a dissatisfied client and
  - h) Conflict resolution.

#### 3.2.2 Proponent's Past Experience on Projects

1. *What we are looking for:*  
The Proponent should demonstrate that over at least the past five (5) years, the Proponent has completed building condition evaluations, component condition evaluations, level 3 assessments, Asset criticality and Integrity analysis, and produced Building Condition Reports, Level 3 assessments and Facility Condition Index/Criticality analysis that include an assessment of building component remaining life and recommendations for component life extension and replacement projects covering a period of at least twenty-five years into the future.
2. *What the Proponent should provide:*
  - a) A brief description of a maximum of two (2) significant building or component condition evaluation projects for large portfolio complexes completed over the last five (5) years by the firm;
  - b) For the above projects, include the names of senior personnel and project personnel who were involved as part of the project team and their respective responsibilities;
  - c) For the above projects, indicate if the Building Condition Data was entered into a VFA survey or facility database;

- d) Indicate the dates the services were provided for the listed projects;
  - e) Scope of services rendered, project objectives, constraints and deliverables; and
  - f) Client references - name, address, e-mail, phone and fax of client contact at working level. Reference checks may be completed if deemed necessary.
3. The Proponent (as defined in the General Instructions G11) must possess the knowledge on the above projects. Past project experience from entities other than the Proponent will not be considered in the evaluation unless these entities form part of a joint venture Proponent.
  4. Please indicate those projects which were carried out in joint venture and the responsibilities of each of the involved firms in each project.

**\*Note: significant is defined as any one or multiple components of a Building System.**

### 3.2.3 Sub Consultant's Past Experience on Projects

Describe the accomplishments, achievements and experience either as prime consultant or in a sub-consultant capacity on projects. If the Proponent proposes to provide multi-disciplinary services, which might otherwise be performed by a sub-consultant/ Specialist, it should be reflected under this rated requirement.

1. *What we are looking for:*  
The Proponent should demonstrate that their key Sub-Consultants (Architect, Mechanical Engineer, Electrical Engineer and Structural Engineer) have completed building condition evaluations and Building Condition Reports that include an assessment of building component remaining life and recommendations for component life extension and replacement projects covering a period of at least twenty-five years into the future.
2. What the Proponent should provide (recommended one (1) page for each sub consultant, maximum four (4) pages):
  - a) A brief description of a maximum of one (1) significant building or component condition evaluation projects for large portfolio complexes completed over the last five (5) years by the firm;
  - b) For the above projects, include the names of senior personnel and project personnel who were involved as part of the project team and their respective responsibilities;
  - c) For the above projects, indicate if the Building Condition Data was entered into a VFA survey or facility database;
  - d) Indicate the dates the services were provided for the listed projects;
  - e) Scope of services rendered, project objectives, constraints and deliverables; and
  - f) Client references - name, address, e-mail, phone and fax of client contact at working level. Reference checks may be completed if deemed necessary.
3. Please indicate those projects which were carried out as a Sub-Consultant and which were carried out as a Prime Consultant while stating your responsibilities for each project.

**\*Note: significant is defined as any one or multiple components of a Building System.**

### 3.2.4 Senior and Project Personnel Expertise and Experience

1. *What we are looking for:*  
Demonstration of in-house senior personnel with the capability, capacity and expertise to manage and lead a technical team carrying out the requested services.
2. *What the Proponent should provide (recommended maximum of seven (7) pages):*  
Submit one (1), one (1) page curriculum vitae (c.v.) for the senior personnel of the Prime Consultant and each of the six (6) Sub-Consultants/Specialist of the team. Each curriculum vitae should clearly indicate:
  - Years of experience in the provision of the requested services.
  - Years of experience.
  - Years associated with the firm.
  - Professional accreditation.

### 3.2.5 Project Personnel Expertise and Experience

1. *What we are looking for:*  
Demonstration of project personnel, in-house or subcontracted, with the capability, capacity and expertise to provide the requested services.
2. *What the Proponent should provide (recommended maximum of seven (7) pages):*  
Submit a maximum of one (1) one (1) page curriculum vitae (c.v.) for the Prime Consultant project personnel and one (1) one (1) page curriculum vitae (c.v.) for each of the six (6) Sub-Consultants/Specialist project personnel of the team which will perform the majority of the work resulting from the individual Call-ups. Each curriculum vitae should clearly indicate:
  - Years of experience in the provision of the requested services.
  - Years of experience.
  - Years associated with the firm.
  - Professional accreditation.

### 3.2.6 Format and Presentation

The proposal will be concise, ordered and formatted according to SRE 2.1.

## 3.3 EVALUATION AND RATING

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

Criterion	Weight Factor	Rating	Score
Team Approach / Management of Services	1	0 - 10	0 - 10
Proponent Past Experience on Projects	3	0 - 10	0 - 30
Sub-Consultant's Past Experience on Projects	2	0 - 10	0 - 20
Senior Personnel Expertise and Experience	1.5	0 - 10	0 - 15
Project Personnel Expertise and Experience	2	0 - 10	0 - 20
Format and Presentation	0.5	0 - 10	0 - 5
<b>Total</b>	<b>10</b>		<b>0 - 100</b>

**Generic Evaluation Table**

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

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

To be considered further, proponents **must** achieve a minimum weighted rating of sixty (60) out of the hundred (100) points available for the rated technical criteria as specified above.

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

#### **SRE 4 PRICE OF SERVICES**

All price proposal envelopes corresponding to responsive proposals which have achieved the pass mark of sixty (60) points are opened upon completion of the technical evaluation. When there are three or more responsive proposals, an average price is determined by adding all the price proposals together and dividing the total by the number of price proposals being opened. This calculation will not be conducted when one or two responsive proposals are received.

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

The remaining price proposals are rated as follows:

1. The lowest price proposal receives a Price Rating of 100
2. The second, third, fourth and fifth lowest prices receive Price Ratings of 80, 60, 40, and 20 respectively. All other price proposals receive a Price Rating of 0.
3. On the rare occasions where two (or more) price proposals are identical, the matching price proposals receive the same rating and the corresponding number of following ratings are skipped.

The Price Rating is multiplied by the applicable percentage to establish the Price Score.

#### **SRE 5 TOTAL SCORE**

Total Scores will be established in accordance with the following:

<b>Rating</b>	<b>Possible Range</b>	<b>% of Total Score</b>	<b>Score (Points)</b>
Technical Rating	0 - 100	90	0 - 90
Price Rating	0 - 100	10	0 - 10
<b>Total Score</b>		<b>100</b>	<b>0 – 100</b>

The proposals will be ranked in order from the highest to the lowest using the total score (technical plus price). The proponents submitting the highest ranked proposals will be recommended for issuance of a standing offer. In the case of a tie, the Proponent submitting the lower price for the services will be selected. Canada reserves the right to issue up to six (5) Standing Offers.

## SRE 6 SUBMISSION REQUIREMENTS - CHECKLIST

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

Please follow detailed instructions in "Submission of Proposals", General Instructions to Proponents (GI 10).

- Declaration / Certifications Form - completed and signed form provided in Appendix A
- Integrity Provisions – Required documentation – **as applicable**, in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per General instructions to Proponents (GI), Integrity Provisions – Proposal, **section 3a**.
- Integrity Provisions - Declaration of Convicted Offences – **with its bid, as applicable**, in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per General instructions to Proponents (GI), Integrity Provisions – Proposal, **section 3b**.
- Proposal - 1 original + 5 copies
- Front page of Request for Standing Offer
- Team Identification - completed and signed form provided in Appendix C
- Front page of Revision(s) to a Request for Standing Offer

In a separate envelope:

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

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## APPENDIX A

### Declaration/Certifications Form

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**Declaration / Certifications Form (page 1 of 5)**

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**Name of Proponent:**

**Street Address:**

**Mailing Address** (if different than street address)

**City:**

**City:**

**Prov./Terr./State:**

**Prov./Terr./State:**

**Postal/ZIP Code:**

**Postal/ZIP Code:**

**Telephone Number:**(    )

**Fax Number:**    (    )

**E-Mail:**

**Procurement Business Number:**

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**Type of Organization**

**Size of Organization**

\_\_\_ Sole Proprietorship

Number of Employees \_\_\_\_\_

\_\_\_ Partnership

Graduate Architects/ \_\_\_\_\_

\_\_\_ Corporation

Prof. Engineers: \_\_\_\_\_

\_\_\_ Joint Venture

Other Professionals \_\_\_\_\_

Technical Support \_\_\_\_\_

Other \_\_\_\_\_

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### Declaration / Certifications Form (page 2 of 5)

#### Federal Contractors Program for Employment Equity - Certification

I, the Proponent, 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 proposal non-responsive, or may set-aside a Standing Offer, or will declare a consultant in default, if a certification is found to be untrue, whether during the proposal evaluation period, during the Standing Offer period, or during the contract period. Canada will have the right to ask for additional information to verify the Proponent's certifications. Failure to comply with any request or requirement imposed by Canada may render the proposal non-responsive, may result in the Standing Offer set-aside, 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: \_\_\_\_\_ (YY/MM/DD) (If left blank, the date will be deemed to be the RFSO closing date.)

Complete both A and B.

A. Check one of the following:

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

A5. The Proponent certifies having a combined workforce in Canada of 100 or more employees; and

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

**OR**

- A5.2. The Proponent certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to ESDC-Labour. As this is a condition to issuance of a standing offer, 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 Proponent is not a Joint Venture.

**OR**

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

## Former Public Servant (FPS) - Certification

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

### Definitions

For the purposes of this clause,

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

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

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

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

### Former Public Servant in Receipt of a Pension

As per the above definitions, is the Proponent a FPS in receipt of a pension? YES ( ) NO ( )

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

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

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

### **Work Force Adjustment Directive**

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

If so, the Proponent must provide the following information:

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

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.

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**Declaration / Certifications Form (page 5 of 5)**

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**Name of Proponent:**

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**This Declaration forms part of the offer.**

Education, Professional Accreditation and Experience:

All statements made with regard to the education, professional accreditation and the experience of individuals proposed for providing services under the Standing Offer are accurate and factual, and we are aware that Canada reserves the right to verify any information provided in this regard and that untrue statements may result in the proposal being declared non-responsive. Should a verification by Canada disclose untrue statements, Canada shall have the right to treat any standing offer resulting from this solicitation as being in default and to terminate it accordingly.

**DECLARATION:**

I, the undersigned, being a principal of the Proponent, hereby certify that the information given on this form and in the attached Proposal is accurate to the best of my knowledge.

**Name (print):** \_\_\_\_\_

**Capacity:** \_\_\_\_\_

**Signature** \_\_\_\_\_

**Telephone Number:** ( ) \_\_\_\_\_

**Fax Number:** ( ) \_\_\_\_\_

**E-mail:** \_\_\_\_\_

**Date:** \_\_\_\_\_

During proposal evaluation period, PWGSC contact will be with the above named person.

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

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## APPENDIX B

### Price Offer

## APPENDIX B - PRICE OFFER

### INSTRUCTIONS

1. Complete price offer form and submit in a separate sealed envelope, with the Offeror's name, Solicitation Number, and "Price Offer Form" typed on the outside.
2. Price offers are not to include GST/HST and will be evaluated in Canadian Dollars.
3. Offerors are not to alter or add information to the form.
4. In order to ensure that fair and competitive hourly rates are received for each of the positions listed, the following requirement must be strictly adhered to: **Offerors must provide an hourly all inclusive rate for each listed position.** In the event that the firm consists of fewer personnel than listed, provide an hourly all inclusive rate that corresponds with each position listed. The hourly all inclusive rate provided must be equal to or greater than the hourly all inclusive rate provided for the position listed below it. For example, if the firm does not have an Intermediate Personnel, the hourly all inclusive rate provided must be equal to or greater than the hourly all inclusive rate provided for the Junior Personnel. Failure to insert an hourly all inclusive rate for each position listed will render your offer non-responsive.
5. The Offeror shall provide a single fixed hourly all inclusive rate for each category of personnel of each sub-consultant and specialist.
  - a. Fixed hourly all inclusive rate for each category of personnel of each Sub-Consultant & Specialists provided by the offeror will be used for years 1 and 2 of the Standing Offer.
  - b. The Standing Offer rates for years 3 and 4 will be determined by using the rates provided for years 1 and 2 adjusted by a percentage increase of 2.0%
  - c. The Standing Offer rates for year 5 will be determined by using the rates provided for years 3 and 4 adjusted by a percentage increase of 2.0%
6. Travel and Living Expenses: Firms are advised that any travel time and travel-related expenses associated with the delivery of services within a 100 km radius of Parliament Hill are to be calculated as an integral part of the hourly all inclusive rates. For delivery of services outside of this 100 km radius, travel-related expenses will be paid (with prior approval of the Departmental Representative) in accordance with current Treasury Board Policy.
7. Training: Firms are advised that all training time is to be calculated as an integral part of the hourly all inclusive rates, for all training provided by PWGSC.
8. Fixed hourly all inclusive rates for each category are to be provided in column B and are then multiplied by the weight factor in column A (provided for evaluation purpose only).
9. In the summary table, Weighted Hourly Rates for each Discipline are to be entered in column B and then multiplied by the weight factor % in column A (provided for evaluation purposes only).
10. In the event that a mathematical error occurs in carrying over the totals, PWGSC will correct the totals to ensure the fairness of the Offers.

**APPENDIX B – PRICE OFFER**

Name of Offeror: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

**Prime Consultant** \_\_\_\_\_

	<b>Weight Factor (A)</b>	<b>Fixed Hourly Rate (all inclusive) (B)</b>	<b>Total (A X B)</b>
Partner or Principals of the firm	10	\$	\$
Senior Personnel	30	\$	\$
Intermediate Personnel	45	\$	\$
Junior Personnel	15	\$	\$
<b>Total:</b>	<b>100</b>		\$

1

**Architect** \_\_\_\_\_

	<b>Weight Factor (A)</b>	<b>Fixed Hourly Rate (all inclusive) (B)</b>	<b>Total (A X B)</b>
Partner or Principals of the firm	10	\$	\$
Senior Personnel	30	\$	\$
Intermediate Personnel	45	\$	\$
Junior Personnel	15	\$	\$
<b>Total:</b>	<b>100</b>		\$

2

**Mechanical Engineer** \_\_\_\_\_

	<b>Weight Factor (A)</b>	<b>Fixed Hourly Rate (all inclusive) (B)</b>	<b>Total (A X B)</b>
Partner or Principals of the firm	10	\$	\$
Senior Personnel	30	\$	\$
Intermediate Personnel	45	\$	\$
Junior Personnel	15	\$	\$
<b>Total:</b>	<b>100</b>		\$

3

**Electrical Engineer** \_\_\_\_\_

	<b>Weight Factor (A)</b>	<b>Fixed Hourly Rate (all inclusive) (B)</b>	<b>Total (A X B)</b>
Partner or Principals of the firm	10	\$	\$
Senior Personnel	30	\$	\$
Intermediate Personnel	45	\$	\$
Junior Personnel	15	\$	\$
<b>Total:</b>	<b>100</b>		\$

4

**Structural Engineer** \_\_\_\_\_

	<b>Weight Factor (A)</b>	<b>Fixed Hourly Rate (all inclusive) (B)</b>	<b>Total (A X B)</b>
Partner or Principals of the firm	10	\$	\$
Senior Personnel	30	\$	\$
Intermediate Personnel	45	\$	\$
Junior Personnel	15	\$	\$
<b>Total:</b>	<b>100</b>		\$

5

**Vertical Transportation Specialist** \_\_\_\_\_

	<b>Weight Factor (A)</b>	<b>Fixed Hourly Rate (all inclusive) (B)</b>	<b>Total (A X B)</b>
Partner or Principals of the firm	10	\$	\$
Senior Personnel	35	\$	\$
Intermediate Personnel	55	\$	\$
<b>Total:</b>	<b>100</b>		\$

6

**Cost Specialist** \_\_\_\_\_

	<b>Weight Factor (A)</b>	<b>Fixed Hourly Rate (all inclusive) (B)</b>	<b>Total (A X B)</b>
Partner or Principals of the firm	10	\$	\$
Senior Personnel	35	\$	\$
Intermediate Personnel	55	\$	\$
<b>Total:</b>	<b>100</b>		\$

7

**Appendix B – Price Offer Summary Table**

Discipline	Weight Factor % (A)	Weighted Hourly Rates (B)	Total (A X B)
Prime Consultant	10%		
Architect	20%		
Mechanical Engineer	20%		
Electrical Engineer	20%		
Structural Engineer	20%		
Vertical Transportation Specialist	5%		
Cost Specialist	5%		
Total:	100		

**Signature of Consultant or Joint Venture Consultants**

.....	.....
Signature	Signature
.....	.....
Capacity	Capacity
.....	.....
Signature	Signature
.....	.....
Capacity	Capacity

**END OF PRICE OFFER FORM**

## APPENDIX C

### TEAM IDENTIFICATION FORMAT INSTRUCTIONS

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

**Please note, SRE 3.2 Rated Requirements has a separate requirement which includes the provision of C.V's for evaluation purposes.**

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

#### I. Prime Consultant (Offeror): Architect

**Firm Name:** .....

Key Individuals:

1. Name .....
2. Category of Personnel (i.e. Principal, Senior, Intermediate) .....
3. Provincial professional licensing status. ....

#### II. Key Sub Consultants/Specialist

##### A. Key Sub Consultants/Specialist: Architect

**Firm Name:** .....

Key Individuals:

1. Name .....
2. Category of Personnel (i.e. Principal, Senior, Intermediate) .....
3. Provincial professional licensing status. ....

**B. Key Sub Consultants/Specialist: Structural**

**Firm Name:** .....

Key Individuals:

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

**C. Key Sub Consultants/Specialist: Mechanical**

**Firm Name:** .....

Key Individuals:

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

**D. Key Sub Consultants/Specialist: Electrical**

**Firm Name:** .....

Key Individuals:

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

**E. Key Sub Consultants/Specialist: Vertical Transportation**

**Firm Name:** .....

Key Individuals:

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

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**F. Key Sub Consultants/Specialist: Cost Consultant**

**Firm Name:** .....

Key Individuals:

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

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## **APPENDIX D**

### **Doing Business with PWGSC – Pacific Region**

**Document attached separately. See Attachments for the document.**