



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

**Bid Receiving - PWGSC / Réception des  
soumissions - TPSGC**  
**11 Laurier/11,rue Laurier**  
**Place du Portage, Phase III**  
**Core 0B2 / Noyau 0B2**  
**Gatineau, Québec K1A 0S5**  
**Bid Fax: (819) 997-9776**

**REQUEST FOR PROPOSAL**  
**DEMANDE DE PROPOSITION**

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

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

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

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

**Comments - Commentaires**

**THIS PROCUREMENT CONTAINS A SECURITY  
REQUIREMENT**

<b>Title - Sujet</b> PPB A&E - Integrated Campus	
<b>Solicitation No. - N° de l'invitation</b> EP750-182231/B	<b>Date</b> 2018-07-13
<b>Client Reference No. - N° de référence du client</b> EP750-182231	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$PPS-021-26904	
<b>File No. - N° de dossier</b> 021pps.EP750-182231	<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 2018-08-23</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Bennett, Adrian	<b>Buyer Id - Id de l'acheteur</b> 021pps
<b>Telephone No. - N° de téléphone</b> (613) 990-3849 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> PWGSC / TPSGC Operations - Parliament Hill Opérations - Terrain Colline Parlementaire Wellington St, Ottawa K1A0A6	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**

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

**Issuing Office - Bureau de distribution**

Parliamentary Precinct Division/Acquisitions de la Cité  
parlementaire  
222 Queen Street / 222, rue Queen  
Ottawa  
Ontario  
K1A 0S5

<b>Delivery Required - Livraison exigée</b>	<b>Delivery Offered - Livraison proposée</b>
<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/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</b>	
<b>Signature</b>	<b>Date</b>

## REQUEST FOR PROPOSAL

---

### THIS PROCUREMENT CONTAINS A SECURITY REQUIREMENT

### REQUEST FOR PROPOSAL (RFP)

#### TABLE OF CONTENTS

The following is intended to clarify the general structure of the whole document.

Front Page

Supplementary Instructions to Proponents (SI)

- SI1 Introduction
- SI2 Proposal Documents
- SI3 Questions or request for clarifications
- SI4 Canada's Trade Agreements
- SI5 CERTIFICATIONS**
- SI6 Security Requirement**
- SI7 Web Sites
- SI8 Breakdown of the Contract
- SI9 Bidders Conference
- SI10 Inclusion

Terms, Conditions and Clauses

Agreement

Supplementary Conditions (SC)

- SC1 Security Requirement**
  - SC2 Language Requirements
  - SC3 Federal Contractors Program for Employment Equity - Default by the Consultant
  - SC4 Task Authorization Process
  - SC5 Periodic Usage Reports – Contracts With Task Authorizations
  - SC6 Basis Of Payment – Individual Task Authorizations
  - SC7 Task Authorization Limit
  - SC8 Limitation Of Expenditure – Cumulative Total Of All Task Authorizations
  - SC9 Optional Limitation Of Expenditure – Cumulative Total Of All Task Authorizations
  - SC10 Canada's Obligation – Portion Of The Services – Task Authorizations
  - SC11 Period of the Contract
  - SC12 Option to Extend the Contract
  - SC13 Time Verification**
  - SC14 Discretionary Audit**
  - SC15 Escalation of Hourly Rates
  - SC16 Contracting Authority
  - SC17 Task Authorization Authority
  - SC18 Aboriginal Participation Plan
-

## REQUEST FOR PROPOSAL

---

### Agreement Particulars

Team Identification Format (Appendix A)

Declaration/Certifications Form (Appendix B)

Price Proposal Form (Appendix C)

Doing Business with PWGSC (Appendix D)

### **Security Requirements Check List (Appendix E)**

Security Information (Appendix F)

Task Authorization Form (Appendix G)

Submission Requirements and Evaluation (SRE)

Project Brief

- Project Description (PD)

- Project Administration and Governance (PA)

- Required Services (RS)

- Annexes

## REQUEST FOR PROPOSAL

---

### SUPPLEMENTARY INSTRUCTIONS TO PROPONENTS (SI)

#### SI1 INTRODUCTION

1. Public Works and Government Services Canada (PWGSC) intends to retain an individual consulting firm or joint venture to provide the professional services for the project as set out in this Request for Proposal (RFP).
2. This is a single phase selection process. The nature of the requirement and the anticipated limited number of response by the industry leads PWGSC to believe that this approach will not unduly force a large number of firms to expend an overall unreasonable amount of effort in response to PWGSC.
3. Proponents responding to this RFP are requested to submit a full and complete proposal. The proposal will cover not only the qualifications, experience and organization of the proposed Consultant Team, but also the detailed approach to the work, and the pricing and terms offered. A combination of the technical and price of services submissions will constitute the proposal.

#### SI2 PROPOSAL DOCUMENTS

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

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

2. The following are the proposal documents:

- (a) Supplementary Instructions to Proponents (SI);

R1410T (2017-08-17), General Instructions (GI) – Architectural and/or Engineering services – Request for Proposal;  
Submission Requirements and Evaluation (SRE);

Subsection 2.b. of section GI16, Submission of proposal of R1410T, incorporated by reference above, is deleted in its entirety and replaced with the following:

- b. send its proposal only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit specified on page 1 of the RFP;

## REQUEST FOR PROPOSAL

---

Paragraph 3 of Subsection 3.2 Section GI3, Overview of Selection Procedure, of the General Instruction (GI) – Architectural and/or Engineering Services – Request for Proposal R1410T incorporated by reference above is deleted in its entirety and replaced with the following:

“The price envelopes of all responsive proposals are opened upon completion of the technical evaluation. An average price is determined by adding all the price proposals together and dividing the total by the number of price proposals opened.”

Paragraph 5 of Subsection 3.2 Section GI3, Overview of Selection Procedure, of the General Instruction (GI) – Architectural and/or Engineering Services – Request for Proposal R1410T incorporated by reference above is deleted in its entirety and replaced with the following:

“5. The remaining price proposals are rated on a linear basis from the lowest evaluated price to 25% above the average price, as follows:

Price Rating =  $20 - \frac{(\text{the price of the proposal} - \text{the lowest price})}{(25\% \text{ above the average price} - \text{the lowest price})} \times 20$   
”

- (b) the general terms, conditions and clauses, as amended, identified in the Agreement clause;
  - (c) Project Brief;
  - (d) the document entitled "Doing Business with PWGSC";
  - (e) the **Security Requirements Check List (SRCL)**;
  - (f) any amendment to the solicitation document issued prior to the date set for receipt of proposals; and
  - (g) the proposal, Declaration/Certifications Form and Price Proposal Form.
3. Submission of a proposal constitutes acknowledgment that the Proponent has read and agrees to be bound by these documents.

### **SI3 QUESTIONS OR REQUEST FOR CLARIFICATION**

Questions or requests for clarification during the solicitation period must be submitted in writing to the Contracting Authority named on the RFP - Page 1 as early as possible. Enquiries should be received no later than five (5) working days prior to the closing date identified on the front page of the Request for Proposal. Enquiries received after that date may not be answered prior to the closing date of the solicitation.

---

## REQUEST FOR PROPOSAL

---

### SI4 CANADA'S TRADE AGREEMENTS

This procurement is set aside from the international trade agreements under the provision each has for measures with respect to Aboriginal peoples or for set-asides for small and minority businesses.

Further to Article 800 of the [Canadian Free Trade Agreement](#) (CFTA), CFTA does not apply to this procurement.

### SI5 CERTIFICATIONS

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

In accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Proponent must **provide with its bid, as applicable**, to be given further consideration in the procurement process, the required documentation as per R1410T (2017-08-17), General instructions 1 (GI1), Integrity Provisions – Proposal, **section 3b**.

#### 2. Federal Contractors Program for Employment Equity - Proposal Certification

By submitting a proposal, the Proponent certifies that the Proponent, and any of the Proponent's members if the Proponent is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](#)" list available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html>).

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

Canada will also have the right to terminate the Agreement 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 Agreement.

The Proponent must provide the Contracting Authority with a completed Federal Contractors Program for Employment Equity - Certification (see Appendix B - Declaration/Certifications Form), before contract award. 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.

## REQUEST FOR PROPOSAL

---

### **SI6 SECURITY REQUIREMENT**

1. Before award of a contract, the following conditions must be met:
  - (a) the Proponent must hold a valid organization security clearance as indicated in SRE3.1.5;
  - (b) the Proponent's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in SRE3.1.5;
  - (c) the Proponent must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.
2. Proponents are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Proponent to obtain the required clearance will be at the entire discretion of the Contracting Authority.
3. For additional information on security requirements, proponents should refer to the Contract Security Program of Public Works and Government Services Canada ((<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.
4. Proponents are hereby informed that there is a strong possibility that Task Authorizations will require that the Consultant, Sub-Consultants and their personnel possesses a Facility Security Clearance (FSC) and personnel screening at the SECRET level issued by the Contract Security Program of Public Works and Government Services Canada (PWGSC).
  - a) Should any of the successful Proponent's proposed Consultant Team members not have the level of security indicated above, PWGSC will sponsor the party so CISC can initiate procedures for security clearance. CISC, by letter, will forward documentation to the successful proponent for completion.
  - b) Proponents desiring such sponsorship should so indicate in their covering letter with their proposal.
  - c) The Consultant, if not possessing the required security clearance at time of Task Authorization issuance, will be bypassed at PWGSC's discretion and the services will be sought from elsewhere.

## REQUEST FOR PROPOSAL

---

### SI7 WEBSITES

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

Employment Equity Act

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

Federal Contractors Program (FCP)

<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html>

Certificate of Commitment to Implement Employment Equity form LAB 1168

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

Ineligibility and Suspension Policy

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

Code of Conduct for Procurement

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

Lobbying Act

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

Buy and Sell

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

Supplier Registration Information

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

Consultant Performance Evaluation Report Form

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

Canadian economic sanctions

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

National Joint Council (NJC) Travel Directive

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



**REQUEST FOR PROPOSAL****SI8 BREAKDOWN OF THE CONTRACT**

Taxes Included	Stream 1	Stream 2	Stream 3
<b>Contract</b> <b>2 Years</b>	Stream 1 Required Services (RS) Fixed Fee 2 Years	TA Limitation of Expenditure Up to \$6,780,000 2 Years	
<b>Option 1</b> <b>Delivery 6 Months</b>	Stream 1 Implementation Strategy and Costing Plan Fixed Fee		
<b>Option 2</b> <b>Delivery 4 Months</b>	Stream 1 Synopsis Document Fixed Fee		
<b>Option 3</b> <b>3 Years</b>		Optional Extension of the Contract 36 months	
<b>Option 4</b> <b>\$5,997,692.31</b>		Optional TA Limitation of Expenditure Increase \$5,997,692.31	
<b>Option 5</b> <b>3 Years</b>		Optional Extension of the Contract 36 months	
<b>Option 6</b> <b>\$5,997,692.31</b>		Optional TA Limitation of Expenditure Increase \$5,997,692.31	
<b>Option 7</b> <b>3 Years</b>		Optional Extension of the Contract 36 months	
<b>Option 8</b> <b>\$5,997,692.31</b>		Optional TA Limitation of Expenditure Increase \$5,997,692.31	
<b>Option 9</b> <b>4 Years</b>		Optional Extension of the Contract 48 months	
<b>Option 10</b> <b>\$7,996,923.07</b>		Optional TA Limitation of Expenditure Increase \$7,996,923.07	

**SI9 BIDDERS CONFERENCE**

It is recommended that the Proponent or a representative of the Proponent attend the Bidders Conference. Arrangements have been made for a Bidders Conference to be held at 395 Wellington Street, Ottawa, Ontario on July 26, 2018. The Bidders Conference will begin at 14:00, in Salon A.

Proponents are requested to communicate with the Contracting Authority no later than July 23, 2018 at 14:00 to confirm attendance and provide the name(s) of the person(s) who will attend. Proponents may be requested to sign an attendance sheet. Proponents who do not attend or do not send a representative will not be given an alternative appointment but they will not be precluded from submitting a bid. Any clarifications or changes to the bid solicitation resulting from the Bidders Conference will be included as an amendment to the bid solicitation.

## REQUEST FOR PROPOSAL

---

### **SI10 INCLUSION**

In view of supporting the Government of Canada's commitment to the socio-economic development of underrepresented groups through federally-funded opportunities, PSPC strongly encourages respondents to put forward a multi-disciplinary team consisting of diverse suppliers defined as business owned or led by Canadians from underrepresented groups including Indigenous Peoples, women, youth, persons with disabilities and visible minorities.

## REQUEST FOR PROPOSAL

---

### TERMS, CONDITIONS AND CLAUSES

#### AGREEMENT

1. The Consultant understands and agrees that upon acceptance of the offer by Canada, a binding Agreement shall be formed between Canada and the Consultant and the documents forming the Agreement shall be the following:
  - (a) the Front Page and this Agreement clause;
  - (b) the General Terms, Conditions and Clauses, as amended, identified as:
    - R1210D (2017-08-17), General Condition (GC) 1 - General Provisions – Architectural and/or Engineering Services
    - R1215D (2016-01-28), General Condition (GC) 2 - Administration of the Contract – Architectural and/or Engineering Services
    - R1220D (2015-02-25), General Condition (GC) 3 - Consultant Services
    - R1225D (2015-04-01), General Condition (GC) 4 - Intellectual Property
    - R1230D (2016-01-28), General Condition (GC) 5 - Terms of Payment – Architectural and/or Engineering Services
    - R1235D (2011-05-16), General Condition (GC) 6 - Changes
    - R1240D (2011-05-16), General Condition (GC) 7 - Taking the Services Out of the Consultant's Hands, Suspension or Termination
    - R1245D (2016-01-28), General Condition (GC) 8 - Dispute Resolution – Architectural and/or Engineering Services
    - R1250D (2015-07-03), General Condition (GC) 9 - Indemnification and Insurance
  - Supplementary Conditions
  - Agreement Particulars
  - (c) Project Brief;
  - (d) the document entitled "Doing Business with PWGSC";
  - (e) the Security Requirements Check List (SRCL);**
  - (f) any amendment to the solicitation document incorporated in the Agreement before the date of the Agreement;
  - (g) the signed Task Authorizations (including all of its annexes, if any);
  - (h) the proposal, the Declaration/Certifications Form and the Price Proposal Form.
2. The documents identified above by title, number and date are hereby incorporated by reference into and form part of this Agreement, as though expressly set out herein, subject to any other express terms and conditions herein contained.

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

## REQUEST FOR PROPOSAL

---

3. If there is a discrepancy between the wording of any documents that appear on the following list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.
- (a) any amendment or variation in the Agreement that is made in accordance with the terms and conditions of the Agreement;
  - (b) any amendment to the solicitation document incorporated in the Agreement before the date of the Agreement;
  - (c) this Agreement clause;
  - (d) Supplementary Conditions;
  - (e) General Terms, Conditions and Clauses;
  - (f) Agreement Particulars;
  - (g) Project Brief;
  - (h) the document entitled "Doing Business with PWGSC";
  - (i) the document entitled "**Security Requirement Check List**";
  - (j) the signed Task Authorizations (including all of its annexes, if any);
  - (k) the proposal.

### SUPPLEMENTARY CONDITIONS (SC)

#### SC1 SECURITY REQUIREMENT

1. The Consultant must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of SECRET, with approved Document Safeguarding at the level of SECRET, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Consultant personnel requiring access to PROTECTED/CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of RELIABILITY STATUS or SECRET, as required, and all others must have a valid SITE ACCESS clearance, as required, granted or approved by CISD/PWGSC.
3. The Consultant MUST NOT utilize its Information Technology systems to electronically process, produce or store any sensitive PROTECTED/CLASSIFIED information until CISD/PWGSC has issued written approval. After approval has been granted, these tasks may be performed at the level of SECRET.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
5. The Consultant must comply with the provisions of the:

## REQUEST FOR PROPOSAL

---

- a) Security Requirements Check List and security guide (if applicable), attached at Appendix E;
- b) Industrial Security Manual (Latest Edition).

### **SC2 LANGUAGE REQUIREMENTS**

Use the following in Agreements where the Consultant must be capable to provide services in both official languages.

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 Project 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.

### **SC3 FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - 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 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 will constitute the Consultant in default as per the terms of the contract.

## REQUEST FOR PROPOSAL

---

### SC4 TASK AUTHORIZATION PROCESS

#### Task Authorization:

The Services or a portion of the Services to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Services described in the TA must be in accordance with the scope of the Contract.

#### Task Authorization Process:

1. The Task Authorization Authority will provide the Consultant with a description of the task using the "Task Authorization" form specified in Appendix G.
2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis(bases) and methods of payment as specified in the Contract.
3. The Consultant must provide the Task Authorization Authority within the specified timeframe, as per PA1.4, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.
4. The Consultant must not commence services until a TA authorized by the Task Authorization Authority or Contracting Authority, as applicable, has been received by the Consultant. The Consultant acknowledges that any services performed before a TA has been received will be done at the Consultant's own risk.

## REQUEST FOR PROPOSAL

### Issued TA

- Task Authorization Authority sends TA form to The Consultant indicating
- Scope of Services
- Basis of Payment
- Deadline for response

### Returned TA

- The Consultant returns the TA to the Task Authorization Authority within response time including:
- Price, substantiated by level of effort and hourly rates
- Signature

### Approved TA

- Authorized agent of Canada signs Authorization block
- Once above signature made, services of the TA begin

### Closed TA

- TA close out occurs once the TA services have been satisfactorily completed and accepted by Canada

## SC5 PERIODIC USAGE REPORTS – CONTRACTS WITH TASK AUTHORIZATIONS

The Consultant must compile and maintain records on its provision of services to the federal government under authorized Task Authorizations issued under the Contract.

The Consultant must provide this data in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Consultant must still provide a "nil" report.

The data must be submitted on a quarterly basis to the Contracting Authority. The quarterly periods are defined as follows:

1st quarter: April 1 to June 30;  
2nd quarter: July 1 to September 30;  
3rd quarter: October 1 to December 31; and  
4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than fourteen (14) calendar days after the end of the reporting period.

### Reporting Requirement- Details

A detailed and current record of all authorized tasks must be kept for each contract with a task authorization process. This record must contain:

## REQUEST FOR PROPOSAL

---

For each authorized task:

- i. the authorized task number or task revision number(s);
- ii. a title or a brief description of each authorized task;
- iii. the total estimated cost specified in the authorized Task Authorization (TA) of each task, exclusive of Applicable Taxes;
- iv. the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
- v. the start and completion date for each authorized task; and
- vi. the active status of each authorized task, as applicable.

For all authorized tasks:

- i. the amount (exclusive of Applicable Taxes) specified in the contract (as last amended, as applicable) as Canada's total liability to the contractor for all authorized TAs; and
- ii. the total amount, exclusive of Applicable Taxes, expended to date against all authorized TAs.

### **SC6 BASIS OF PAYMENT – INDIVIDUAL TASK AUTHORIZATIONS**

The Consultant will be paid for the Services specified in the authorized task authorization, in accordance with the Basis of Payment, from the R1230D (2016-01-28), General Condition (GC) 5 – Terms of Payment – Architectural and/or Engineering Services, as stipulated in the Task Authorization.

Canada's liability to the Consultant under the authorized task authorization must not exceed the limitation of expenditure specified in the authorized task authorization.

No increase in the liability of Canada or in the price of the Services specified in the authorized task authorization resulting from any design changes, modifications or interpretations of the Services will be authorized or paid to the Consultant unless these design changes, modifications or interpretations have been authorized, in writing, by the Contracting Authority before their incorporation into the Services.

### **SC7 TASK AUTHORIZATION LIMIT**

The Task Authorization Authority may authorize individual task authorizations up to a limit of \$25,000.00, Applicable Taxes included, inclusive of any revisions.

Any task authorization to be issued in excess of that limit must be authorized by the Contracting Authority before issuance.



## REQUEST FOR PROPOSAL

---

### **SC8 LIMITATION OF EXPENDITURE – CUMULATIVE TOTAL OF ALL TASK AUTHORIZATIONS**

1. Canada's total liability to the Consultant under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of \$6,780,000 (HST included). Canada reserves the right to reduce this limitation of expenditure at time of contract award.
2. No increase in the total liability of Canada will be authorized or paid to the Consultant unless an increase has been approved, in writing, by the Contracting Authority.
3. The Consultant must notify the Contracting Authority in writing as to the adequacy of this sum:
  - a. when it is 75 percent committed, or
  - b. four (4) months before the contract expiry date, or
  - c. as soon as the Consultant considers that the sum is inadequate for the completion of the Services required in all authorized TAs, inclusive of any revisions, whichever comes first.
4. If the notification is for inadequate contract funds, the Consultant must provide to the Contracting Authority, a written estimate for the additional funds required. Provision of such information by the Consultant does not increase Canada's liability.

### **SC9 OPTIONAL LIMITATION OF EXPENDITURE – CUMULATIVE TOTAL OF ALL TASK AUTHORIZATIONS**

The Consultant grants to Canada four (4) irrevocable options to increase Canada's total liability to the Consultant under the Contract for all authorized Task Authorizations (TAs), by \$5,997,692.31 for "Option 4", \$5,997,692.31 for "Option 6", \$5,997,692.31 for "Option 8" and \$7,996,923.07 for "Option 10", taxes included, inclusive of any revisions of the TAs under the same conditions and at the prices and/or rates stated in the Contract. The options may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment.

The Contracting Authority may exercise any option at any time before the expiry of the Contract by sending a written notice to the Consultant.

## REQUEST FOR PROPOSAL

---

### **SC10 CANADA'S OBLIGATION – PORTION OF THE SERVICES – TASK AUTHORIZATIONS**

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

### **SC11 PERIOD OF THE CONTRACT**

The period of the Contract is from date of Contract to [*date of Contract plus 24 months, to be inserted at contract award*] inclusive.

### **SC12 OPTION TO EXTEND THE CONTRACT**

The Consultant grants to Canada irrevocable options to extend the term of the Contract by up to three (3) additional three (3) year period(s), referred to as "Option 3, 5, and 7", and one (1) additional four (4) year period, "Option 9", under the same conditions. The Consultant agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Consultant before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

### **SC13 TIME VERIFICATION**

Time charged and the accuracy of the Consultant's time recording system are subject to verification by Canada, before or after payment is made to the Consultant. If verification is done after payment, the Consultant must repay any overpayment, at Canada's request.

### **SC 14 DISCRETIONARY AUDIT**

1. The following are subject to government audit before or after payment is made:
    - a. The amount claimed under the Contract, as computed in accordance with the Basis of Payment, including time charged.
    - b. The accuracy of the Consultant's time recording system.
    - c. The estimated amount of profit in any firm-priced element, firm time rate, firm overhead rate, or firm salary multiplier, for which the Consultant has provided the appropriate certification. The purpose of the audit is to determine whether the actual profit earned on a single contract if only one exists, or the aggregate of actual profit earned by the Consultant on a
-

## REQUEST FOR PROPOSAL

series of negotiated contracts containing one or more of the prices, time rates or multipliers mentioned above, during a particular period selected, is reasonable and justifiable based on the estimated amount of profit included in earlier price or rate certification(s).

- d. Any firm-priced element, firm time rate, firm overhead rate, or firm salary multiplier for which the Consultant has provided a "most favoured customer" certification. The purpose of such audit is to determine whether the Consultant has charged anyone else, including the Consultant's most favoured customer, lower prices, rates or multipliers, for like quality and quantity of goods or services.
2. Any payments made pending completion of the audit must be regarded as interim payments only and must be adjusted to the extent necessary to reflect the results of the said audit. If there has been any overpayment, the Consultant must repay Canada the amount found to be in excess.

### SC15 ESCALATION OF HOURLY RATES

The Stream 2 and 3 firm hourly rates detailed in the Agreement Particulars will be adjusted annually on the Contract Anniversary date, starting with Contract Year 3, if an option to extend the contract is exercised, by the amount established based on the percentage change in the sum of the monthly indices of the Consumer Price Index, All-items, published in Statistics Canada Table No. 326-0020, <http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/cpis01a-eng.htm> for the 12-month base period ending three months prior to the Contract Anniversary date from the same 12-month period of the preceding year. This will be calculated using the following formula:

$$\text{Escalation\%} = \left( \frac{\text{Sum of Indices for the 12 months ending in 3 months prior to Contract Anniversary}}{\text{Sum of Indices for the 12 months ending same month of the preceding year}} - 1 \right) * 100\%$$

#### Example:

Assuming that the contract is signed July 1, 2013, the start of the 3rd year of the contract would be July 1, 2015 and Stream 2 and 3 firm hourly rates would be increased by 1.72% based on the following assumptions:

Preceding Year 12 month period = May 2013 - April 2014    Sum of Indices = 1,481.4

Current Year 12 month period    = May 2014 - April 2015    Sum of Indices = 1,506.9

$$\text{Escalation} = (1,506.9 / 1,481.4 - 1) * 100$$

$$\text{Escalation} = 1.72\%$$

To determine the Contract Year 4 rates in the example, the Contract Year 3 rates determined above would be adjusted using the same Statistics Canada Table and

## REQUEST FOR PROPOSAL

---

same formula with data for the two 12 month periods May 2014 - April 2015 and May 2015 - April 2016.

### SC16 CONTRACTING AUTHORITY

The Contracting Authority for the Contract is:

Name: Adrian Bennett  
Title: Supply Team Leader  
Public Works and Government Services Canada  
Acquisitions Branch  
Real Property Contracting Directorate  
E-mail: [adrian.bennett@pwgsc-tpsgc.gc.ca](mailto:adrian.bennett@pwgsc-tpsgc.gc.ca)

The Contracting Authority is responsible for the management of the Contract, and any changes to the Contract must be authorized in writing by the Contracting Authority. The Consultant must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

### SC17 TASK AUTHORIZATION AUTHORITY

*[To be inserted at time of contract award.]*

### SC18 ABORIGINAL PARTICIPATION PLAN

Within 60 days after Contract Award, the Consultant must submit to the Crown for approval a finalized Aboriginal Participation Plan (APP) to include, at a minimum, the draft Plan submitted with the bid proposal. Each year, one month after the anniversary date of the contract, the Consultant must submit an annual report detailing the APP accomplishments in the preceding year. Based on the finalized APP, Canada may negotiate an Incentive program, the type/value will be solely at the Crown's discretion and negotiated post Contract Award.

### AGREEMENT PARTICULARS

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

## APPENDIX A – TEAM IDENTIFICATION FORMAT

---

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

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

### I. Prime Consultant (Proponent – Architect/Urban Planner):

Firm or Joint Venture Name: .....  
.....  
.....

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

.....  
.....  
.....  
.....  
.....

### II. Key Sub Consultants / Specialists:

#### Advocate Architect

Firm Name: .....  
.....  
.....

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

.....  
.....  
.....  
.....  
.....

### III. Key Sub Consultants / Specialists:

#### Urban Design

Firm Name: .....  
.....  
.....

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

.....

## APPENDIX A – TEAM IDENTIFICATION FORMAT

---

.....  
.....  
.....  
.....

### IV. Key Sub Consultants / Specialists:

#### Landscape Architecture

Firm Name: .....  
.....  
.....

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

.....  
.....  
.....  
.....  
.....

### V. Key Sub Consultants / Specialists:

#### Sustainability Specialist

Firm Name: .....  
.....  
.....

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

.....  
.....  
.....  
.....  
.....

### VI. Key Sub Consultants / Specialists:

#### Security Specialist

Firm Name: .....  
.....  
.....

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

.....

## APPENDIX A – TEAM IDENTIFICATION FORMAT

---

.....  
.....  
.....  
.....

### VII. Key Sub Consultants / Specialists:

#### Heritage Specialist

Firm Name: .....  
.....  
.....

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

.....  
.....  
.....  
.....  
.....

### VIII. Key Sub Consultants / Specialists:

#### Civil Engineering

Firm Name: .....  
.....  
.....

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

.....  
.....  
.....  
.....  
.....

### IX. Key Sub Consultants / Specialists:

#### Structural Engineering

Firm Name: .....  
.....  
.....

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

.....

## APPENDIX A – TEAM IDENTIFICATION FORMAT

---

.....  
.....  
.....  
.....

### **X. Key Sub Consultants / Specialists:**

#### **Mechanical Engineering**

Firm Name: .....  
.....  
.....

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

.....  
.....  
.....  
.....  
.....

### **XI. Key Sub Consultants / Specialists:**

#### **Electrical Engineering**

Firm Name: .....  
.....  
.....

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

.....  
.....  
.....  
.....  
.....



## APPENDIX B – DECLARATION/CERTIFICATIONS FORM

---

**Project Title:**

**Name of Proponent:**

**Street Address:**

**Mailing Address:**

**Telephone Number: (    )**

**Fax Number: (    )**

**E-Mail:**

**Procurement Business Number:**

<b>Type of Organization:</b>  _____ Sole Proprietorship  _____ Partnership  _____ Corporation  _____ Joint Venture	<b>Size of Organization:</b>  Number of Employees _____  Graduate Architects / Professional Engineers _____  Other Professionals _____  Technical Support _____  Other _____
--	--

## APPENDIX B – DECLARATION/CERTIFICATIONS FORM

---

### 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 will declare a consultant in default, if a certification is found to be untrue, whether during the proposal evaluation 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 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 bid closing date.)

Complete both A and B.

A. Check only 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 has a combined work force in Canada of 100 or more employees; and

## APPENDIX B – DECLARATION/CERTIFICATIONS FORM

---

- ☐ 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 contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- ☐ B1. The 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)

## APPENDIX B – DECLARATION/CERTIFICATIONS FORM

---

### Former Public Servant (FPS) - Certification

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

### Definitions

For the purposes of this clause,

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

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

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

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

## APPENDIX B – DECLARATION/CERTIFICATIONS FORM

---

### Former Public Servant in Receipt of a Pension

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

YES ( ) NO ( )

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

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

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

### Work Force Adjustment Directive

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

If so, the Proponent must provide the following information:

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

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

## APPENDIX B – DECLARATION/CERTIFICATIONS FORM

### Name of Proponent:

#### DECLARATION:

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

.....  
name signature

.....  
title

I have authority to bind the Corporation / Partnership / Sole Proprietorship / Joint Venture

.....  
name signature

.....  
title

I have authority to bind the Corporation / Partnership / Sole Proprietorship / Joint Venture

.....  
name signature

.....  
title

I have authority to bind the Corporation / Partnership / Sole Proprietorship / Joint Venture

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

Telephone Number: (    ) \_\_\_\_\_ Fax Number: (    ) \_\_\_\_\_

E-mail: \_\_\_\_\_

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

## APPENDIX C – PRICE PROPOSAL FORM

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

**Proponents must provide a non-zero fixed fee or hourly rate, as applicable, for every service listed in the Price Proposal Form.**

Any errors in the addition or multiplication of the amounts in the Price Proposal Form will be corrected by Canada to obtain the Total Evaluated Fee. In the case of error in the extension or addition of unit prices, the unit price will govern.

PROONENTS SHALL NOT ALTER THIS FORM

**Project Title:**

**Name of Proponent:**

---

**The following will form part of the evaluation process:**

---

### **STREAM 1: REQUIRED SERVICES**

**Fixed Fee** (R1230D (2016-01-28), GC 5 - Terms of Payment – Architectural and/or Engineering Services)

**Fixed fee must be supported with the breakdown of the workplan from SRE3.6.3 and must identify proposed team resources, hourly rates and number of anticipated hours per task.**

Canada reserves the right to use the hourly for future contract amendments. Canada may accept or reject any of the hourly rates and Canada reserves the right to negotiate on these hourly rates.

SERVICES

FIXED FEE

**MAXIMUM FIXED FEES**

**\$..... (A)**

## APPENDIX C – PRICE PROPOSAL FORM

### STREAM 1: OPTIONAL SERVICES

including all related costs, services and deliverables to complete the services as specified in the Project Brief:

The Consultant hereby grants to Canada an irrevocable option to acquire the services specified in the Project Brief, Stream 1 Implementation Strategy & Costing Plan, under the same terms and conditions as contained in the contract, and in accordance with the rates and fees identified below. Canada is not obliged to exercise these options. The options shall only be exercised by the Contracting Authority by providing notification in writing through a formal Contract Amendment.

### OPTION 1: STREAM 1 IMPLEMENTATION STRATEGY & COSTING PLAN

**Fixed Fee** (R1230D (2016-01-28), GC 5 - Terms of Payment – Architectural and/or Engineering Services)

**Fixed fee must be supported with the breakdown of the workplan from SRE3.6.3 and must identify proposed team resources, hourly rates and number of anticipated hours per task.**

Canada reserves the right to use the hourly for future contract amendments. Canada may accept or reject any of the hourly rates and Canada reserves the right to negotiate on these hourly rates.

SERVICES

FIXED FEE

**MAXIMUM FIXED FEES**

**\$..... (B)**

### OPTION 2: STREAM 1 SYNOPSIS DOCUMENT

**Fixed Fee** (R1230D (2016-01-28), GC 5 - Terms of Payment – Architectural and/or Engineering Services)

**Fixed fee must be supported with the breakdown of the workplan from SRE3.6.3 and must identify proposed team resources, hourly rates and number of anticipated hours per task.**

Canada reserves the right to use the hourly for future contract amendments. Canada may accept or reject any of the hourly rates and Canada reserves the right to negotiate on these hourly rates.

SERVICES

FIXED FEE

**MAXIMUM FIXED FEES**

**\$..... (C)**



**APPENDIX C – PRICE PROPOSAL FORM****Additional Workshop Fees**

**Cost Per Half-Day Workshop (including all staff time, preparation of materials, attendance and facilitation, preparation of meeting minutes)**

**Fixed fee must be supported with the breakdown of the workplan from SRE3.6.3 and must identify proposed team resources, hourly rates and number of anticipated hours per task.**

Canada reserves the right to use the hourly for future contract amendments. Canada may accept or reject any of the hourly rates and Canada reserves the right to negotiate on these hourly rates.

**FIXED FEE**

**Cost Per Half-Day Workshop**

**\$..... (D)**

**STREAM 2 AND 3 HOURLY RATES**

**Hourly Rates to be used for all Task Authorizations. Fee Arrangement to be determined at the time of Task Authorization issuance. Task Authorizations may be issued under the following Fee Arrangements:**

- 1. Time Based Fees** (R1230D (2016-01-28), GC 5 - Terms of Payment– Architectural and/or Engineering Services)
- 2. Fixed Fee** (R1230D (2016-01-28), GC 5 - Terms of Payment – Architectural and/or Engineering Services)

<b>Architecture</b>			
Discipline	Architect, Advocate Architect		
Level	Estimated Hours* Column A	Hourly Rate** Column B	Extended Fee*** Columns AxB
Principal in charge / Project Manager	1000	\$.....	\$.....
Senior Architect	1000	\$.....	\$.....
Lead Advocate Architect	1000	\$.....	\$.....
Intermediate Architect	1000	\$.....	\$.....

**APPENDIX C – PRICE PROPOSAL FORM**

Junior Architect	1000	\$.....	\$.....
Senior Architectural Technologist	1000	\$.....	\$.....
Intermediate Architectural Technologist	1000	\$.....	\$.....
Junior Architectural Technologist	1000	\$.....	\$.....
Senior Technician/Draftsman	1000	\$.....	\$.....
Intermediate Technician/Draftsman	1000	\$.....	\$.....
Junior Technician/Draftsman	1000	\$.....	\$.....
Architectural Student	1000	\$.....	\$.....
Consultant Resident Site Representative	1000	\$.....	\$.....
<b>Engineering</b>			
Discipline	Structural, Mechanical, Electrical, Geotechnical, Civil		
Level	Estimated Hours* Column A	Hourly Rate** Column B	Extended Fee*** Columns AxB
Lead Discipline Engineer	1000	\$.....	\$.....
Senior Engineer	1000	\$.....	\$.....
Intermediate Engineer	1000	\$.....	\$.....
Junior Engineer	1000	\$.....	\$.....
Senior Technologist	1000	\$.....	\$.....
Intermediate Technologist	1000	\$.....	\$.....
Junior Technologist	1000	\$.....	\$.....

**APPENDIX C – PRICE PROPOSAL FORM**

Senior Technician	1000	\$.....	\$.....
Intermediate Technician	1000	\$.....	\$.....
Junior Technician	1000	\$.....	\$.....
Engineering Student	1000	\$.....	\$.....
<b>Other Design Professionals</b>			
Disciplines	Urban Design, Urban Planning, Landscape Architecture, Conservation Architecture		
Level	Estimated Hours* Column A	Hourly Rate** Column B	Extended Fee*** Columns AxB
Senior Professional	1000	\$.....	\$.....
Intermediate Professional	1000	\$.....	\$.....
Junior Professional	1000	\$.....	\$.....
Senior Technologist	1000	\$.....	\$.....
Intermediate Technologist	1000	\$.....	\$.....
Junior Technologist	1000	\$.....	\$.....
Senior Technician	1000	\$.....	\$.....
Intermediate Technician	1000	\$.....	\$.....
Junior Technician	1000	\$.....	\$.....
Student	1000	\$.....	\$.....

**APPENDIX C – PRICE PROPOSAL FORM****Other Specialty Services**

Disciplines	Cost Specialist (Note 2, 4), Time Specialist (Note 2), Risk Specialist (Note 2, 3), Building Information Modeling (BIM), Sustainable Development Specialist, Smart/Intelligent Building Specialist, Climate Change Vulnerability and Risk Assessment Specialist, Green/Clean Technology Specialist, Building Envelope, IT/Telecommunications Specialist, Building Code Specialist, Audio-visual Specialist, Acoustic Specialist, Security Specialist, Food Services/Kitchen Consultant, Vertical Transportation Specialist, Wayfinding and Signage Specialist, Roofing Specialist, Traffic Specialist, Lighting Specialist, Hardware Design Specialist, Move Coordination Specialist, Indigenous Affairs Specialists, Blast Engineering Specialists (Note 1), Public Consultation Specialist, Industrial Engineering/Material Handling Specialist (Note 1), Interior Design (Note 1)		
-------------	--	--	--

Level	Estimated Hours* Column A	Hourly Rate** Column B	Extended Fee*** Columns AxB
Senior Specialist- <u>Licensed</u> Profession	1000	\$.....	\$.....
Intermediate Specialist- <u>Licensed</u> Profession	1000	\$.....	\$.....
Junior Specialist- <u>Licensed</u> Profession	1000	\$.....	\$.....
Senior Specialist- <u>Non</u> <u>Licensed</u> Profession	1000	\$.....	\$.....
Intermediate Specialist- <u>Non Licensed</u> Profession	1000	\$.....	\$.....
Junior Specialist- <u>Non</u> <u>Licensed</u> Profession	1000	\$.....	\$.....

**Notes:**

1. The Consultant, Sub-consultants/Specialists and their personnel must be capable of practicing architecture and engineering, licenced or eligible to be licenced, certified or otherwise to provide professional services in Ontario to the full extent as required for project services.

## APPENDIX C – PRICE PROPOSAL FORM

2. Resources to have appropriate academic or technical qualifications for the position.
3. Resources must hold a relevant PMI certification or equivalent.
4. A valid Professional Quantity Surveyor designation registered with the Canadian Institute of Quantity Surveyors (CIQS) or equivalent. The list of equivalents can be found on the Canadian Institute of Quantity Surveyors website.

### Support Personnel for “Other Specialty Services” disciplines listed above

Level	Estimated Hours* Column A	Hourly Rate** Column B	Extended Fee*** Columns AxB
Senior Support Personnel	1000	\$.....	\$.....
Intermediate Support Personnel	1000	\$.....	\$.....
Junior Support Personnel	1000	\$.....	\$.....
<b>EVALUATED EXTENDED FEE (SUM of All Extended Fees)</b>		\$..... (E)	

\*Estimated number of hours is given for evaluation purposes only. Travel time and/or expenses will not be reimbursed separately (Refer to R1230D (2016-01-28), GC 5.12 – Disbursements).

\*\* All inclusive hourly rate is applicable to both normal working hours and any other shift work as required.

\*\*\* Extended fee is for evaluation purposes only and has no bearing on Canada's liability to the Consultant.

## APPENDIX C – PRICE PROPOSAL FORM

---

---

### TOTAL COST OF SERVICES FOR PROPOSAL EVALUATION PURPOSES

Total Fee for Required Services		\$.....(A)
Total Fee for Option 1 and 2	+	\$.....(B + C)
One Half-day Workshop	+	\$.....(D)
Evaluated Extended Fee	+	<u>\$..... (E)</u>
<b>Total Evaluated Fee</b>		<b>\$.....</b>

---

END OF PRICE PROPOSAL FORM



## Doing Business with PWGSC

### Documentation and Deliverables Manual



---

## Contents

1	General .....	1
1.1	Effective Date .....	1
1.2	Authority .....	1
1.3	Purpose .....	1
1.4	Scope .....	1
1.5	Harmonization with Terms of Reference .....	1
1.6	Departmental Name Change .....	1
1.7	Terminology .....	1
1.8	Definitions .....	2
2	Construction Documents .....	3
2.1	General .....	3
2.2	Drawings .....	4
2.3	Building Information Modelling (BIM) .....	6
2.4	Specifications .....	6
2.5	Addenda .....	10
3	Cost Estimates .....	12
3.1	Cost Estimates Submission Formats .....	12
3.2	Classes of Cost Estimates for Construction Projects .....	12
4	Project Schedules .....	14
4.1	Schedule Format .....	14
4.2	Progress Report .....	14
Appendix A	Checklist for the Submission of Construction Documents .....	17
Appendix B	Drawings and Specifications Table of Contents Template .....	22
Appendix C	Addenda Formatting Template .....	23
Appendix D	Directory Structure and Naming Convention Standards for Construction Tender Documents ..	24



---

## Revisions

Version	Date	Description
0.1	August 14 2017	Draft version for consultation.
1.0	January 12, 2018	Original Issuance

---

# **1 General**

## **1.1 Effective Date**

January 12, 2017

## **1.2 Authority**

This manual is issued by the authority of the Director General, Technical Services, Real Property Branch (RPB), Public Works and Government Services Canada (PWGSC).

## **1.3 Purpose**

This document provides architectural and engineering (A&E) consultants with the requirements for producing deliverables for PWGSC projects in order to ensure a well-documented design process, and facilitate review by PWGSC staff.

## **1.4 Scope**

This document shall apply to design-bid-build projects undertaken by PWGSC on its own behalf as well as for other government departments (OGDs). It is applicable to all regions of PWGSC and can be supplemented with regional addendum.

## **1.5 Harmonization with Terms of Reference**

This document shall be used in conjunction with the project's Project Brief / Terms of Reference (TOR). In case of a conflict between documents, the requirements of the TOR prevail over those of this document.

## **1.6 Departmental Name Change**

In the fall of 2015, Public Works and Government Services Canada (PWGSC) was renamed Public Services and Procurement Canada (PSPC).

This name change is occurring in a phased approach, and for most documents PSPC should be used. However, all contract documents shall use the legal name Public Works and Government Services Canada (PWGSC) until the name has been changed in legislation.

## **1.7 Terminology**

This document utilizes the following terminology:

- “shall” is used to express a requirement, a provision the Consultant is obligated to meet;
- “should” is used to express a recommendation; and
- “may” is used to express an option or that which is permissible within the limits of this document.

---

## 1.8 Definitions

**Addenda:** Changes to the construction documents or tendering procedures, issued during the tendering process.

**Construction Documents:** The drawings and specifications (including addenda).

**Drawings:** The graphic means of showing work to be done, as they depict shape, dimension, location, quantity of materials and relationship between building components.

**Reports:** Written account given of a particular matter after thorough investigation or consideration prepared by the Consultant.

**Specifications:** Written descriptions of materials and construction processes in relation to quality, colour, pattern, performance and characteristics of materials, installation and quality of work requirements.

---

## 2 Construction Documents

### 2.1 General

This section provides direction to Consultant firms on the preparation of construction documents (namely specifications and drawings) to be submitted to PWGSC for real property projects across Canada.

Specifications, drawings, and addenda shall be complete and clear so that contractors can prepare bids without guesswork.

#### 2.1.1 Principles of PWGSC Contract Documents

Contact documents shall be prepared based on common public procurement principles. PWGSC does not use Canadian Construction Documents Committee (CCDC) documents.

PWGSC is responsible for preparing and issuing the construction contract and the terms and conditions as well as all other related bidding and contractual documents. For detailed information, the standard acquisition clauses and conditions commonly used by PWGSC in the contracting process are available on the [buyandsell.gc.ca](http://buyandsell.gc.ca) website.

#### 2.1.2 Translation

When bilingual documents are required in the Terms of Reference, all documentation including drawings, specifications, reports as well as all bidder questions shall be in both official languages.

Ensure that English and French documents are equal in all respects. There can be no statements where one version takes precedence over the other.

#### 2.1.3 Construction Documents Definitions

Unless otherwise indicated in the Project Brief / Terms of Reference, construction document submissions (33%, 50 or 66%, 99%, and 100% / final) shall meet the definitions outlined below. Further discipline based requirements may be included in the TOR.

- 33%: shall demonstrate general intent of design and compliance and alignment with relevant standards. Summary specification required, but not a full specification.
- 50% or 66%: shall show full system, all components, requirements, and lack only minor details on drawings. Specifications shall be well advanced and contain major work and material requirements and lack only minor details.
- 99%: shall be for final review by PWGSC, lacking no detail and complete with a project specific specification.
- 100% (or final): shall address comments by PWGSC as required, signed and sealed by the responsible design professional in compliance with various provincial jurisdiction requirements, ready for tender.

#### 2.1.4 Quality Assurance

It is the sole responsibility of the Consultant firms to undertake their own quality control process and to review, correct, and coordinate their documents (between disciplines). The Consultant shall also ensure the constructability of their design.

---

### 2.1.5 Quality Assurance Deliverables

For every construction document submission (33 %, 50 % or 66 %, 99 % and 100 %), the Consultant shall provide:

- a completed and signed Checklist for the Submission of Construction Documents (see Appendix A); and
- an index as per Appendix B.

### 2.1.6 Terminology & Quantities

The Consultant shall use the term “Departmental Representative” instead of Engineer, PWGSC, Owner, Consultant or Architect. “Departmental Representative” means the person designated in the Contract, or by written notice to the Contractor, to act as the Departmental Representative for the purposes of the Contract, and includes a person, designated and authorized in writing by the Departmental Representative to the Contractor.

Notations such as “verify on site,” “as instructed,” “to match existing,” “example,” “equal to,” “equivalent to,” and “to be determined on site by Departmental Representative” shall not be indicated in specifications nor in drawings, as such wording promotes inaccurate and inflated bids.

Construction documents shall permit bidders to bid accurately. If a precise quantity is impossible to identify (e.g. cracks to be repaired), then provide an estimated quantity for bidding purposes (to be used in conjunction with unit prices). Ensure that the terminology used throughout construction documents is consistent and does not contradict applicable codes and standards.

### 2.1.7 Units of Measure

All units of measure within drawings and specifications shall be based on the International System of Units (SI).

## 2.2 Drawings

### 2.2.1 General

Drawings shall be prepared in accordance with the [PWGSC National CADD Standard](#) and the Canadian Standards Association CSA B78.5-93: *Computer-Aided Design Drafting (Buildings)*. Drawing shall also meet the following criteria:

- dimensions shall be in metric only (no dual dimensioning);
- no trade names present on any drawings; and
- no specification-type notes are on any drawing.

### 2.2.2 Information to be Included

Drawings should show the quantities of the elements, the configuration of the project, the dimensions, and details of how the work is constructed. There should be no references to future work or information that will be changed by future addenda. The scope of work should be clearly detailed, and elements not in the Contract should be eliminated or kept to an absolute minimum.

### 2.2.3 Title Blocks and Revision Notes

PWGSC title block shall be used for drawings and sketches (including addenda).

The percent of drawing completion should be included in the revision notes. Revision notes shall be inputted during design development, but cleared for 100% complete drawing (ready for tender).

---

## 2.2.4 Drawing Numbers

Drawings should be numbered in sets according to the type of drawing and the discipline involved as indicated in the following table. The requirements of the *PWGSC National CADD Standard* supersede these requirements, where warranted.

Discipline	Drawing
Demolition	D01, D02, etc.
Architecture	A01, A02, etc.
Civil	C01, C02, etc.
Landscaping	L01, L02, etc.
Mechanical	M01, M02, etc.
Electrical	E01, E02, etc.
Structural	S01, S02, etc.
Interior Design	ID01, ID02, etc.

## 2.2.5 Presentation Requirements

Present the drawings in sets, providing the applicable demolition, site plan, civil, landscaping, architecture, structural, mechanical, and electrical drawings in that order. All drawings should be of uniform standard size.

## 2.2.6 Legends

Provide a legend of symbols, abbreviations, references, etc., on the front sheet of each set of drawings, or in the case of large sets of drawings, provided the legend immediately after the title sheet and index sheets.

## 2.2.7 Schedules and Tables

Where schedules or tables occupy entire sheets, locate them at the back of each set of drawings for convenient reference.

## 2.2.8 North Arrow

Include a north arrow on all plans. Orient all plans in the same direction for easy cross-referencing. Wherever possible, lay out plans so that the north point is at the top of the sheet.

## 2.2.9 Drawing Symbols

Follow generally accepted drawing conventions, understandable by the construction trades and in accordance with PWGSC publications.

## 2.2.10 As-Built Drawings

As-built drawings are official record drawings and shall represent as constructed conditions including location and size of equipment, devices, plumbing lines, mechanical and electrical equipment, structural elements etc. As-built drawings shall be updated in CAD, handwritten notes are not acceptable.

## 2.2.11 Submission Format

Unless otherwise stated in the Terms of Reference, drawing submissions shall be in electronic and hard copy format.

---

### **2.2.11.1 Drawing Hard Copy Deliverable Format**

Drawing submitted in hard copy shall be:

- printed to scale with black lines on white paper;
- bound with staple or other means into sets, where presentations exceed 50 sheets, the drawings for each discipline may be bound separately for convenience and ease of handling; and
- of a paper size as agreed to with the Departmental Representative.

### **2.2.11.2 Drawing Electronic Copy Deliverable Format**

Drawing submitted electronically shall be provided:

- without password protection or printing restrictions;
- in two formats:
  - PDF/E-1 (in compliance with ISO 24517-1);
  - .dwg format; and
- in accordance with Appendix D.

## **2.3 Building Information Modelling (BIM)**

PWGSC is committed to using non-proprietary or “OpenBIM” standards. As such, the Consultant is not required to use any specific proprietary software format. For the sake of legacy information quality, the Consultant shall use the international standards of interoperability for BIM (IFC) in all cases where models are submitted. Consultants shall work with software that is compliant to this standard.

Where used, BIM shall not replace the submission requirements outlined by this document. Rather, consultants shall submit models in addition requirements outlined herein.

Where BIM is used, models and modelled information shall be submitted in the following two formats:

- .native (whichever format is native to the Modelling software used by the Consultant);
- .ifc (Industry Foundation Classification – IFC4 – [ISO 16739:2013](#)); and

All Modelled Information, and Model Information Exchanges shall conform to:

- Project-specific requirements, such as they are laid out in the Project Execution Plan, Project Documentation and Model Element Table; and
- The project-identified BIM Standards & Guidelines.

Models for electronic submissions shall be organized as per Appendix D.

## **2.4 Specifications**

### **2.4.1 National Master Specification**

Specifications prepared for PWGSC shall follow the most current version of the [National Master Specification \(NMS\)](#) format offered by the National Research Council.

The Consultant has overriding responsibility for the content of construction project specifications. For each specification, he or she shall edit, amend, and supplement the NMS template as deemed necessary to produce an appropriate project specification free of conflict and ambiguity. The Consultant should refer to the latest *NMS User's Guide* and *NMS Development Guide* issued by the National Research Council for further guidance on using the NMS.

---

## 2.4.2 Index

Specifications shall include an index which list all specification sections, including numbers of pages, as well as the division and section names in the format shown in Appendix B.

## 2.4.3 Specification Organization

Narrow scope sections describing single units of work should be used for complex work. Broad scope sections may be used for less complex work. The Consultant shall use consistently for the entire specification either the NMS 1/3 page format, the NMS 2/3-page format or the Construction Specifications Canada (CSC) full-page format.

Start each section on a new right hand page and show the PWGSC project number, NMS section title, NMS section number, page number, and specification date on each page. The project title, and Consultant's name are not to be indicated.

## 2.4.4 Standards

Code and standard references in the NMS may not be up to date, the Consultant shall ensure that the project specification use the current applicable edition of all references quoted.

## 2.4.5 Specifying Materials

Specifications should make use of generic names in referencing construction materials. The Consultant should refer to the latest version of the *NMS Development Guide* issued by the National Research Council for further details. The term "Acceptable Manufacturers" shall not be used, as this restricts competition and does not ensure the actual material or product will be acceptable.

### 2.4.5.1 Alternate Products and Materials

Alternative materials to those specified may be considered during the solicitation period; however, the onus will be on the Consultant to review and evaluate all requests for approval of alternative materials.

### 2.4.5.2 Sole Sourcing

Sole sourcing of materials and/or work is only allowed in exceptional and justifiable circumstances. Prior to including sole source materials and/or work, the Consultant shall contact the Departmental Representative to obtain approval for the sole sourcing. Consultants shall provide proper justification for all individual sole source requirements.

Sole sourcing for materials and work may be required when performing work on existing proprietary systems, such as fire alarm systems, building automation systems (BAS) etc.

Wording for the sole source of work should be in Part 1 as follows:

Designated Contractor

- .1 Retain the services of [\_\_\_\_\_] to do the work of this section.

Wording for the sole source of building automation system should be in Part 1 as follows:

Designated Contractor

- .1 Retain the services of [\_\_\_\_\_] or its authorized representative to complete the work of all building automation system sections.

Wording for the sole source of building automation system should be in Part 2 as follows:



## Materials

- .1 There is an existing [\_\_\_\_\_] system presently installed in the building. All materials must be selected to ensure compatibility with the existing [\_\_\_\_\_] system.

Wording for the sole source of materials (i.e. fire alarm systems) should be in Part 2 as follows:

### Acceptable Materials

- .1 The only acceptable materials are [\_\_\_\_\_].

## 2.4.6 Measurement for Payment

The measurement for payment shall be provided in lump sum or unit prices.

### 2.4.6.1 Unit Prices

Unit prices should only be used in instances where the quantity can only be roughly estimated (e.g. earth work). The approval of the Departmental Representative shall be sought in advance of their use. In each applicable NMS section where unit prices are used, add new or replace paragraph title “Measurement for Payment” with “Unit Prices.” and use the following wording:

[The work for this section] or [define the specific work if required, e.g. rock excavation] will be paid based on the actual quantities measured on site and the unit prices stated in the Bid and Acceptance Form.

Provide a unit price table, sample shown below, to designate the work to which a unit price arrangement applies. The table shall include:

- the price per unit and the estimated total price for each item listed;
- a complete description of each type of work covered; and
- items as described in the referenced specification section.

Item	Specification Reference	Class of Labour, Plant or Material	Unit of Measurement	Estimated Quantity	Price per Unit GST/HST extra	Estimated Total Price GST / HST extra
TOTAL ESTIMATED AMOUNT						

## 2.4.7 Cash Allowances

Construction documents shall be complete and contain all of the requirements for the contractual work. Cash allowances are to be used only under exceptional circumstances (i.e. utility companies, municipalities), where no other method of specifying pricing is appropriate.

To include cash allowances, obtain approval from the Departmental Representative in advance, and use Section 01 21 00 – Allowances of the NMS to specify the criteria.

## 2.4.8 Warranties

The 12-month warranty period specified in PWGSC’s standard acquisition clauses and conditions with regard to the contract should typically be retained as is. Extended warranties should only be used where experience has shown that serious defects are likely to appear after expiry of the standard one-year warranty period. When necessary to extend beyond the 12 month warranty period,

---

use the following wording in Part 1 of the applicable technical sections, under the heading “Extended Warranty”:

For the work of this Section [\_\_\_\_], the 12 month warranty period is extended to [\_\_\_\_] months.

Where the extended warranty is intended to apply to a particular part of a specification section, modify the previous text as follows:

For [\_\_\_\_], the 12 month warranty period is extended to [\_\_\_\_] months.

## **2.4.9 Miscellaneous Requirements**

Paragraphs noted as “Scope of Work” shall not be included. Within Part 1 – General of specifications, the paragraphs “Summary” and “Section Includes” shall not be utilized.

## **2.4.10 Specification Coordination**

All sections of the specifications shall be coordinated, including the “Related Sections” portion of specifications and appendices. References to non-existent sections shall not be present within the specifications.

## **2.4.11 Regional Guide**

The Consultant should contact the Departmental Representative to obtain the region’s requirements for Division 01 (General Requirements) or other short-form specifications as appropriate.

## **2.4.12 Health and Safety**

All project specifications are required to include Section 01 35 29 – Health and Safety Requirements. Confirm with the Departmental Representative to determine if there are any instructions to meet regional requirements.

## **2.4.13 Subsurface Investigation Reports**

If required, subsurface investigation report(s) shall be included after Section 31, and the following paragraph added to Section 31:

Subsurface Investigation Report(s)

- .1 Subsurface investigation report(s) are included in the specification following this section.

If the Departmental Representative determines that it is not practical to include the subsurface investigation report(s), alternate instructions will be provided.

Where tender documents are to be issued in both official languages, the subsurface investigation report(s) shall be issued in both languages.

In addition to providing the subsurface investigation report(s), the foundation information required by the current *National Building Code of Canada* (Division C, Part 2, 2.2.4.6) shall be included on foundation drawings.

## **2.4.14 Prequalification and Pre-Award Submissions**

Do not include in the specifications any mandatory contractor and/or subcontractor prequalification or pre-award submission requirements that could become a contract award condition. If a

---

prequalification process or a pre-award submission is required, contact the Departmental Representative.

There should be no references to certificates, transcripts, samples, the license numbers of a trade or subcontractor, or any other documentation or item being included with the bid.

#### **2.4.15 Contracting Issues**

Specifications describe the workmanship and quality of the work and shall not contain any contracting issues. Division 00 of the NMS is not used by PWGSC, except for the Seals page 00 01 07 and the Table of Contents 00 01 10. In specifications, remove all references to the following:

- general instructions to bidders;
- general conditions;
- Canadian Construction Documents Committee (CCDC) documents;
- priority of documents;
- security clauses and clearances;
- terms of payment or holdback;
- the tendering process;
- bonding requirements;
- insurance requirements;
- alternative and separate pricing;
- site visits (mandatory or optional); and
- the release of lien and deficiency holdbacks.

#### **2.4.16 Specification Submission Format**

Unless otherwise stated in the Terms of Reference, specification submissions shall be in electronic and hard copy format.

##### **2.4.16.1 Specification Hard Copy Deliverable Format**

Specifications submitted in hard copy shall be printed on both sides of 216 mm x 280 mm white bond paper.

##### **2.4.16.2 Specification Electronic Copy Deliverable Format**

Specifications submitted electronically shall be:

- provided in PDF/A (in compliance with ISO 19005) format, without password protection and printing restrictions; and
- in accordance with Appendix D.

### **2.5 Addenda**

#### **2.5.1 Format**

Prepare addenda using the format shown in Appendix C. No signature-type information is to appear.

Every page of the addendum (including attachments) shall be numbered consecutively. All pages shall have the PWGSC project number and the appropriate addendum number. Sketches shall appear in the PWGSC format, signed and sealed.

No Consultant information (name, address, phone #, Consultant project #, etc.) should appear in addenda or their attachments (except on sketches).

---

### **2.5.2 Content**

Each item should refer to an existing paragraph of the specification or note/detail on the drawings. The clarification style is not acceptable.

Where there are many or major changes to a section or drawing, consider deleting the entire section or drawing and replacing it with a new version.

---

## 3 Cost Estimates

### 3.1 Cost Estimates Submission Formats

#### 3.1.1 Format

Construction cost estimates for projects shall be prepared in the elemental analysis format, which is in accordance with the latest edition issued by the Canadian Institute of Quantity Surveyors (CIQS) for all PWGSC regions excluding Quebec. Within Quebec region the cost estimates shall be prepared in the Unifomat II format.

#### 3.1.2 Contents

All cost estimates shall contain the following:

- introduction narrative complete with an outline description of the cost estimate basis;
- description of information obtained and used in the cost estimate including the date received;
- listing of notable inclusions;
- listing of notable exclusions;
- listing of items/issues carrying significant risk;
- summary of the itemized cost estimate;
- itemized breakdown of cost estimate by elemental analysis for Class B, C, and D; and
- itemized breakdown of costs estimate in both elemental analysis and National Master Specification division format for Class A, including measured quantities, unit rate pricings and amounts for each item of work.

Allowances, if deemed necessary by Consultant, shall contain the following:

- design allowance to cover unforeseen items during design phase;
- escalation allowance for changes in market conditions between the date of the cost estimate and the date tender is called;
- construction allowance to cover unforeseen items during construction; and
- the basis of calculations of the above allowances.

### 3.2 Classes of Cost Estimates for Construction Projects

PWGSC applies a detailed, four-level classification using the terms Class A, B, C and D. Apply these estimate classifications at the project stages as defined in the TOR. For projects required to be submitted to Treasury Board (TB) for approval: an indicative estimate shall be at least a Class D and a Substantive Estimate shall be at least a Class B.

#### 3.2.1 Class D (Indicative) Estimate

Based upon a comprehensive statement of requirements, an outline of potential solutions and/or functional program, this estimate is to provide an indication of the final project cost that will enable ranking to be made for all the options being considered. This cost estimate shall be prepared in elemental analysis format. The level of accuracy of a Class D cost estimate shall be such that no more than a 20% design allowance is required.

#### 3.2.2 Class C Estimate

Based on schematic/conceptual design and/or comprehensive list of project requirements, this estimate shall be adequately detailed and shall be sufficient for making the correct investment decision. This cost estimate shall be based on measured quantities of all items of work and prepared

---

in elemental analysis format. The level of accuracy of a Class C cost estimate shall be such that no more than a 15% design allowance is required.

### **3.2.3 Class B (Substantive) Estimate**

Based on design development drawings and outline specifications, which include the preliminary design of all major systems and subsystems, as well as the results of all site/installation investigations, this estimate shall provide for the establishment of realistic cost objectives and be sufficient to obtain effective project approval.

This cost estimate shall be based on measured quantities of all items of work and prepared in elemental analysis format. The level of accuracy of a Class B cost estimate shall be such that no more than a 10% design allowance is required.

### **3.2.4 Class A (Pre-Tender) Estimate**

Based on completed construction drawings and specifications prepared prior to calling competitive tenders, this estimate shall be sufficient to allow a detailed reconciliation and/or negotiation with any contractor's tender submission. This cost estimate shall be based on fully measured quantities of all items of work and prepared in both elemental analysis and Trade division format as per MasterFormat™. The level of accuracy of a Class A cost estimate shall be such that no more than a 5% design allowance is required.

---

## 4 Project Schedules

### 4.1 Schedule Format

Project schedules shall be submitted in the .mpp file extension (compatible with MS Project). The schedule shall include:

- major and minor milestones;
- activities representing discrete elements of work assigned to one person which:
  - are named using verb-noun combination (i.e. Review Design Development Report);
  - contain realistic durations in days;
- project logic linking activities with appropriate relationships finish-start (FS), finish-finish (FF), start-start (SS); and
- Identification of the critical path activities.

### 4.2 Progress Report

The progress report shall detail the progress of each activity up to the date of the report. It shall also include any logic changes made, both historic and planned; projections of progress and completion; as well as the actual start and finish dates of all activities being monitored.

The contents of each progress report will vary depending on the requirements at each project phase. A progress report should include:

- an executive summary;
- a narrative report;
- a variance report;
- a criticality report;
- an exception report (as required);
- the master schedule with cash flow projections; and
- the detailed project schedule (network diagram or bar charts).

#### 4.2.1 Executive Summary

The executive summary should provide a synopsis of narrative, variance, criticality and exception report, and is not to exceed one page.

#### 4.2.2 Narrative Report

The project narrative shall detail the work performed to date, comparing work progress to planned, and presenting current forecasts. This report should summarize the progress to date, explaining current and possible deviations and delays and the required actions to resolve delays and problems with respect to the Detailed Schedule, and Critical Paths.

#### 4.2.3 Variance Report

The variance report, with supporting schedule documentation, should detail the work performed to date and compare work progress to work planned. It should summarize the progress to date and explain all causes of deviations and delays and the required actions to resolve delays and problems with respect to the detailed schedule and critical paths. The variance report shall be presented in the following format:

---

Paper size: Letter  
Paper format: Portrait  
Title format: Project Title, Report Type, Print Date, Data Date, Revision Block  
Body text: Narratives for each report to match other reports  
Columns: Activity ID, Activity Name, Planned Finish, Revised Finish, Variance, Activity % Complete

#### 4.2.4 Criticality Report

The criticality report identifies all activities and milestones with negative, zero, and up to five days' Total Float. It is used as a first sort for ready identification of the critical paths, or near-critical paths, through the entire project. The criticality report shall be presented in the following format:

Paper size: Letter  
Orientation: Portrait  
Title format: Project Title, Report Type, Print Date, Data Date, Revision Block  
Body text: Narratives for each report to match other reports  
Columns: Activity ID, Activity Name, Duration, Start, Finish, Activity % Complete, Total Float

#### 4.2.5 Exception Report

The exception report shall be provided when unforeseen or critical issues arise. The Consultant shall advise the Departmental Representative and submit the details and proposed solutions in the form of an exception report. The report shall include sufficient description and detail to clearly identify:

- scope changes, including identifying the nature, reason, and total impact of all identified and potential project scope changes affecting the project;
- delays and accelerations, including identifying the nature, reason, and total impact of all identified and potential duration variations; and
- options enabling a return to the project baseline, including Identifying the nature and potential effects of all proposed options for returning the project within the baselined duration.

The exception report shall be provided in the following format:

Paper size: Letter  
Orientation: Portrait  
Title format: Project Title, Report Type, Print Date, Data Date, Revision  
Body text: Narrative to match other reports

Paper size: Letter  
Orientation: Landscape  
Title format: Project Title, Report Type, Print Date, Data Date, Revision  
Columns: Activity ID, Activity Name, Duration, Remaining Duration, Start, Finish, Total Float



---

#### **4.2.6 Master Schedule**

A master schedule including cash projection shall be provided in the following format:

Paper size: 11X17  
Orientation: Landscape  
Columns: Activity ID, Activity Name, Duration, Activity % Complete, Start, Finish,  
Total Float  
Footer format: Project Title, Report Type, Print Date, Data Date, Revision Block  
Sorting: Early Start, then Early Finish, then Activity ID based on the WBS.

#### **4.2.7 Detailed Project Schedule**

A detailed project schedule shall be provided along with a network diagram or bar charts in the following format:

Paper size: 11X17  
Orientation: Landscape  
Columns: Activity ID, Activity Name, Duration, Activity % Complete, Start, Finish,  
Total Float  
Footer format: Project Title, Report Type, Print Date, Data Date, Revision Block  
Sorting: Early Start, then Early Finish, then Activity ID based on the WBS.

## Appendix A Checklist for the Submission of Construction Documents

Date:	
Project Title:	Project Location:
Project Number:	Contract Number:
Consultant's Name:	PWGSC Departmental Representative
Review Stage (stages may vary at discretion of project team): 33% <input type="checkbox"/> 50% or 66% <input type="checkbox"/> 99% <input type="checkbox"/> 100% <input type="checkbox"/>	

Drawings\Design			
Item	Verified by	Explanations	Action By
<b>1 Index</b>			
<b>1a</b> The index shows a complete listing of drawing titles and numbers.			
<b>2 Title Blocks</b>			
<b>2a</b> The title block is as per the <i>PWGSC National CADD Standard</i> .			
<b>3 Units</b>			
<b>3a</b> All units of measure are metric.			
<b>4 Trade Names</b>			
<b>4a</b> Trade names are not used.			
<b>5 Specification Notes</b>			
<b>5a</b> There are no specification-type notes.			
<b>6 Terminology</b>			
<b>6a</b> The term "Departmental Representative" is used instead of "Engineer," "PWGSC," "Owner," "Consultant," or "Architect."			
<b>6b</b> Notations such as "verify on site," "as instructed," "to match existing," "example," "equal to," "equivalent to," and "to be determined on site by" are not used.			
<b>7 Information to be included</b>			
<b>7a</b> The project quantities, configurations, dimensions, and construction details are included.			
<b>7b</b> References to future work and elements not in the tender documents do not appear or are kept to an absolute minimum and clearly marked.			

<b>Drawings\Design</b>			
<b>Item</b>	<b>Verified by</b>	<b>Explanations</b>	<b>Action By</b>
<b>8 Quality Assurance</b>			
<b>8a</b> Coordination review of the design between various disciplines has been completed by the Consultant.			
<b>8b</b> Constructability review of design has been performed.			
<b>9 Signing and Sealing</b>			
<b>9a</b> Every final drawing bears the seal and signature of the responsible design professional in compliance with various provincial jurisdiction requirements.			

<b>Specifications</b>			
<b>Item</b>	<b>Verified by</b>	<b>Explanations</b>	<b>Action by</b>
<b>1 National Master Specification</b>			
<b>1a</b> The current edition of the National Master Specification (NMS) has been used.			
<b>1b</b> Sections have been included for all work identified on drawings and sections have been edited.			
<b>2 Index</b>			
<b>2a</b> The index shows a complete list of specifications sections with the correct number of pages.			
<b>3 Organization</b>			
<b>3a</b> Either the NMS 1/3- or 2/3-page format or the Construction Specifications Canada full-page format is used consistently for the entire specifications.			
<b>3b</b> Each section starts on a new page and the project number, section title, section number, page number and date is shown on each page.			
<b>3c</b> The Consultant's name is not indicated.			
<b>4 Terminology</b>			
<b>4a</b> The term "Departmental Representative" is used instead of "Engineer," "PWGSC," "Owner," "Consultant," or "Architect."			
<b>4b</b> Notations such as "verify on site," "as instructed," "to match existing," "example," "equal to," "equivalent to," and "to be determined on site by" are not used.			
<b>5 Dimensions</b>			
<b>5a</b> Dimensions are provided in metric only.			
<b>6 Standards</b>			
<b>6a</b> The current edition of all references quoted is used.			
<b>7 Specifications Materials</b>			
<b>7a</b> The method of specifying materials uses recognized standards. Actual brand names and model numbers are not specified.			
<b>7b</b> Materials are specified using standards and performance criteria.			

<b>Specifications</b>			
<b>Item</b>	<b>Verified by</b>	<b>Explanations</b>	<b>Action by</b>
<b>7c</b> Non-restrictive, non-trade name “prescription” or “performance” specifications are used throughout.			
<b>7d</b> The term “Acceptable Manufacturers” is not used.			
<b>7e</b> No sole sourcing has been used.			
<b>7f</b> If sole sourcing has been used, the correct wording has been used and a justification, estimate, and specification have been provided to the Departmental Representative for the sole-sourced products.			
<b>8 Measurement for Payment</b>			
<b>8a</b> Unit prices are used only for work that is difficult to estimate.			
<b>9 Cash Allowances</b>			
<b>9a</b> No cash allowances have been used or if they have, approval from the Departmental Representative has been received.			
<b>10 Miscellaneous Requirements</b>			
<b>10a</b> No paragraphs noted as “Scope of Work” are included.			
<b>10b</b> In Part 1 - General of any section, the paragraphs “Summary” and “Section Includes” are not used.			
<b>11 Specification Coordination</b>			
<b>11a</b> The list of related sections and appendices are coordinated.			
<b>12 Health and Safety</b>			
<b>12a</b> Section 01 35 29.06 – Health and Safety Requirements is included.			
<b>13 Subsurface Investigation Reports</b>			
<b>13a</b> Subsurface investigation reports are included after Section 31.			
<b>14 Prequalifications</b>			
<b>14a</b> There are no mandatory contractor and/or subcontractor prequalification requirements or references to certificates, transcripts, licence numbers of a trade or subcontractor, or other such documentation or item included in the bid.			

<b>Specifications</b>			
<b>Item</b>	<b>Verified by</b>	<b>Explanations</b>	<b>Action by</b>
<b>15 Contracting Issues</b>			
<b>15a</b> Contracting issues do not appear in the specifications.			
<b>15b</b> Division 00 of the NMS is not used except 00 01 07 (Seals Page) and 00 01 10 (Table of Contents).			
<b>16 Quality Assurance</b>			
<b>16a</b> There are no specification clauses with square brackets “[ ]” or lines “_” indicating that the document is incomplete or missing information.			
<b>17 Signing and Sealing</b>			
<b>17a</b> Every final specification bears the seal and signature of the responsible design professional as required. Seals and signatures shall be shown in NMS section 00 01 07.			

I confirm that the drawings and specifications have been thoroughly reviewed and that the items listed above have been addressed or incorporated. I acknowledge and accept that by signing, I am certifying that all items noted above have been addressed.

Consultant's Representative: \_\_\_\_\_

Firm name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

---

## Appendix B Drawings and Specifications Table of Contents Template

### B.1 General

List all drawings by number and title.

For specifications, list all divisions, sections (by number and title), and the number of pages in each section.

### B.2 Sample Table of Contents

---

**Project No:** \_\_\_\_\_ **Table of Contents** **Index**  
**Page 1 of** \_\_\_\_

---

#### DRAWINGS:

C-1	Civil
L-1	Landscaping
A-1	Architecture
S-1	Structural
M-1	Mechanical
E-1	Electrical

#### SPECIFICATIONS:

DIVISION	SECTION	NO. OF PAGES
01	01 00 10 – General Instructions	.....XX
	01 14 25 – Designated Substances Report	.....XX
	01 35 30 – Health and Safety	.....XX
23	23 xx xx	
26	26 xx xx	

---

## Appendix C Addenda Formatting Template

### C.1 Instructions

To re-issue a drawing with an addendum:

- indicate the drawing number and title; and
- list the changes or indicate the revision number and date.

To re-issue a specification with an addendum:

- indicate the section number and title; and
- list all changes (i.e. deletions, additions, and replacements) by article or paragraph.

The addendum, drawings and specifications should be sent as separate files.

### C.2 Sample Addendum

**Date:** \_\_\_\_\_

**Addendum Number:** \_\_\_\_\_

**Project Number:** \_\_\_\_\_

**The following changes in the bid documents are effective immediately.  
This addendum will form part of the construction documents.**

#### **DRAWINGS:**

- 1 A1 Architecture  
.1

#### **SPECIFICATIONS:**

- 1 Section 01 00 10 – General Instructions
  - .1 Delete article (xx) entirely.
  - .2 Refer to paragraph (xx.x),  
delete the following: ...  
and replace with the following: ...
- 2 Section 23 05 00 – Common Work Results - Mechanical
  - .1 Add new article (x) as follows:



---

## **Appendix D Directory Structure and Naming Convention Standards for Construction Tender Documents**

### **D.1 Electronic Submissions**

Electronic submittals of drawings, specification and models shall be in the following format unless otherwise specified in the Terms of Reference or instructed by the Departmental Representative:

- On media burned to read only memory (ROM) on either CD-ROM or DVD+R where:
  - CD-ROMs comply with ISO 9660:1988 standards;
  - DVD+Rs are 4.7 GB, single-sided, single-layer and comply with ISO/IEC 17344:2006 standards;
  - media is “closed” upon completion of burning; and
  - media is usable in such a way that files may be accessed and copied from it.

If BIM model size is greater than storage capacity of a DVD, refer to Terms of Reference or contact the Departmental Representative for transmission instructions.

Some projects may require the Consultant to upload files to an electronic system outlined in the Terms of Reference or as instructed by the Departmental Representative.

### **D.2 Directory Structure**

#### **D.2.1 1<sup>st</sup> Tier Subfolder**

The 1st tier of the directory structure shall be “Project #####” where ##### represents each digit of the Project Number. The Project Number must always be used to name the 1st tier folder and it is always required. Free text can be added following the Project Number, to include such things as a brief description or the project title.

#### **D.2.2 2<sup>nd</sup> Tier Subfolder**

The 2<sup>nd</sup> tier of the directory structure shall consist of: “Bilingual - Bilingue”, “English” and “Français” folders. The folders of the 2nd tier cannot be given any other names since the Government Electronic Tendering System (GETS) uses these names for validation purposes. At least one of the “Bilingual - Bilingue”, “English” and “Français” folders is always required, and these must always have one of the applicable subfolders of the 3rd tier.

#### **D.2.3 3<sup>rd</sup> Tier Subfolder**

The 3<sup>rd</sup> tier of the directory structure shall consist of: “Drawings - Dessins”, “Drawings”, “Models”, “Specifications”, “Reports”, “Dessins”, “Modèles”, “Devis” and “Rapports”. The folders of the 3rd tier cannot be given any other names since GETS also uses these names for validation purposes. There must be always at least one of the applicable 3rd tier folder in each document.

#### **D.2.4 4<sup>th</sup> Tier Subfolder - Drawings**

The 4th-tier subfolders for Drawings should reflect the various disciplines of the set of drawings. Because the order of appearance of the subfolders on the screen will also determine the order of printing, it is necessary to start with a number the identification name of the subfolders in the “Drawings – Dessins”, “Drawings” and “Dessins” folders. The first subfolder must be always reserved for the Title Page and/or the List of Drawings unless the first drawing of the set is an actual numbered discipline drawing.

---

The 4<sup>th</sup> tier “Drawings” and “Dessins” folder shall follow the naming convention:

## - Y

Where:

## = a two digit number ranging from 01 to 99 (leading zeros must be included)

Y = the title of the folder Example: 03 – Mechanical

For the “Drawings - Dessins” folder:

## = Y - Z

Where:

## = a two digit number ranging from 01 to 99 (leading zeros must be included)

Y = the English title of the folder

Z = the French title of the folder

Example:

04 - Electrical – Électrique

The numbering of the 4<sup>th</sup> tier subfolders is for sorting purposes only and is not tied to a specific discipline. For example, “Architecture” could be numbered 05 for a project where there is four other disciplines before “Architecture” in the set of drawings or 01 in another project where it’s the first discipline appearing in the set.

The order of the drawings shall be the same as in the hard copy set. GETS will sort each drawing for both screen display and printing as per the following rules:

- The alphanumerical sorting is done on an ascending order;
- The alphanumerical order of the subfolders determines the order of appearance on the screen as well as the order of printing (as an example: all the drawing PDF files in the 01 sub-older will be printed in alphanumerical order before the drawings in the 02 sub- folder etc.);

Each drawing PDF file within each subfolder will also be sorted alphanumerically. This will determine the order of appearance on the screen as well as the order of printing (i.e. Drawing A001 will be printed before Drawing A002, Drawing M02 before Drawing M03, etc.).

#### **D.2.5 4<sup>th</sup>-Tier Subfolders for Specifications**

The “Specifications” and “Devis” folders must have 4<sup>th</sup> tier subfolders created to reflect the various elements of the specifications. Because the order of appearance of the subfolders on the screen will also determine the order of printing, it is necessary to start with a number the identification name of the subfolders in the “Specifications” and “Devis” folders.

The 4<sup>th</sup> tier subfolders for specifications must adhere to the following standard naming convention for the “Specifications” and “Devis” folders:

## - Y

Where:

## = a two digit number ranging from 01 to 99 (leading zeros must be included)

Y = the title of the folder

Example:

---

## 02 – Divisions

Numbering of the 4th tier subfolders is for sorting purposes only and is not tied to an element of the specifications.

It is essential to ensure that the order of the elements of the specifications on the CD-ROM be exactly the same as in the hard copy. GETS will sort each element of the specifications for both screen display and printing as per the following rules:

- The alphanumerical sorting is done on an ascending order.
- The alphanumerical order of the subfolders determines the order of appearance on the screen as well as the order of printing (as an example: all the specifications PDF files in the 01 subfolder will be printed, in alphanumerical order before the PDF files in the 02 subfolder, etc.).
- Each specifications PDF file within each subfolder will also be sorted alphanumerically. This will determine the order of appearance on the screen as well as the order of printing (i.e. Division 01 will be printed before Division 02, 01 - Appendix A before 02 - Appendix B, etc.).

---

## D.2.6 Directory Structure Example

The following is an example of the directory structure for the tender document, refer to previous sections for requirements, and use only sections applicable to the given project:

```
Project #####
  Bilingual – Bilingue
    Drawings – Dessins
      01 - Drawing List – Liste des dessins
      02 – Demolition – Démolition
      03 – Architecture – Architectural
      04 – Civil – Civil
      05 – Landscaping - Aménagement paysager
      06 – Mechanical – Mécanique
      07 – Electrical – Électricité
      08 – Structural - Structural
      09 – Interior Design – Aménagement intérieur
  English
    Drawings
      01 - Drawing List
      02 – Demolition
      03 – Architecture
      04 – Civil
      05 – Landscaping
      06 – Mechanical
      07 – Electrical
      08 – Structural
      09 – Interior Design
    ...
    Models
    Specifications
      01 – Index
      02 – Divisions
      03 – Appendices
    Reports
  Français
    Dessins
    Modèles
    Devis
    Rapports
```

## D.3 Naming Convention for PDF Files

Each drawing, specifications division or other document that are part of the tender documents must be converted in PDF format (without password protection) in accordance with the following standard naming convention and each PDF file must be located in the appropriate subfolder of the directory structure.

### D.3.1 Drawing File Names

Each drawing must be a separate single page PDF file. The naming convention of each file shall be:

X### - Y

Where:

- 
- X = the letter or letters from the drawing title block (“A” for Architecture or “ID” for Interior Design for example) associated with the discipline
- ### = the drawing number from the drawing title block (one to three digits)
- Y = the drawing name from the drawing title block (for bilingual drawings, the name in both English and French is to appear).

Example:

A001 - First Floor Details

Each drawing that will be located in the appropriate discipline 4th tier subfolders must be named with the same letter (“A” for Architecture Drawings for example) and be numbered. The drawing number used to name the PDF file must match as much as possible the drawing number of the actual drawing (the exception being when leading zeros are required).

The following important points about drawings are to be noted:

- The drawing PDF files within each subfolder are sorted alphanumerically for both displaying and printing. If there are more than 9 drawings in a particular discipline the numbering must use at least two numerical digits (i.e. A01 instead of A1) in order to avoid displaying drawing A10 between A1 and A2. The same rule applies when there are more than 99 drawings per discipline i.e. three digits instead of two must be used for the numbering (for example M003 instead of M03);
- If drawing PDF files are included in the “Bilingual - Bilingue” folder, these cannot be included as well in the “English” and/or “Français” folders;
- If drawings not associated with a particular discipline are not numbered (title page or list of drawings for example), these will be sorted alphabetically. While this does not represent a problem if there is only one drawing in the subfolder, it could disrupt the order when there are two or more drawings. If the alphabetical order of the drawings name does not represent the order on the hard copy set, the drawings are to be named as per the following standard convention when converted in PDF format to ensure proper display and printing order.

### **D.3.2 Specifications**

Each specifications division must be a separate PDF file and all pages contained in each PDF file must have the same physical size (height, width). The drawings and specifications index must also be a separate PDF file. If there are other documents that are part of the Specifications (e.g. Appendix or other) these are to be separate PDF files as well.

### **D.3.3 Documents Other Than Specifications Divisions**

Because PDF files within the Specifications subfolders are sorted alphanumerically (in ascending order) for both on screen display and printing order, all files that appear in folders other than the “Divisions” subfolder must be named using a number:

## - Y

Where:

## = Two digit number ranging from 01 to 99 with leading zeros required

Y = Name of the document

Example:

01 – Drawings and Specifications Index

---

### **D.3.4 Specifications Divisions**

The specifications divisions must be named as follows:

Division ## - Y

Where:

Division ## = the actual word “Division” followed by a space and a two digit number ranging from 01 to 99 (with leading zeros required)

Y = name of the Specifications Division as per CSC/CSI MasterFormat™

Example:

Division 05 – Metals

The Numbering of the Divisions cannot be altered from CSC/CSI MasterFormat™ even if some Divisions are not used in a given project. For example, Division 05 will always remain Division 05 even if Division 04 is not used for a given project.

### **D.4 Media Label**

The CD-ROM or DVD+R shall be labeled with the following information:

Project Number / Numéro de projet

Project Title / Titre du projet

Documents for Tender / Documents pour appel d’offres

Disk X of/de X

Example:

Project 123456 / Projet 123456

Repair Alexandra Bridge / Réparation du pont Alexandra

Documents for Tender / Documents pour appel d’offres

Disk 1 of/de 1



## Appendix E



Government of Canada  
Gouvernement du Canada

Contract Number / Numéro du contrat

20182231

Security Classification / Classification de sécurité  
UNCLASSIFIED

SECURITY REQUIREMENTS CHECK LIST (SRCL)

LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

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





**PART A (continued) / PARTIE A (suite)**

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?  
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? ☒ No ☐ Yes  
Non Oui

If Yes, indicate the level of sensitivity:

Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?  
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? ☒ No ☐ Yes  
Non Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :

Document Number / Numéro du document :

**PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)**

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis



RELIABILITY STATUS  
COTE DE FIABILITÉ



CONFIDENTIAL  
CONFIDENTIEL



SECRET  
SECRET



TOP SECRET  
TRÈS SECRET



TOP SECRET- SIGINT  
TRÈS SECRET - SIGINT



NATO CONFIDENTIAL  
NATO CONFIDENTIEL



NATO SECRET  
NATO SECRET



COSMIC TOP SECRET  
COSMIC TRÈS SECRET



SITE ACCESS  
ACCÈS AUX EMPLACEMENTS

- Additional personnel screening level: site access- A&E Contract will stipulate security clearance levels for personnel including Site Access

Special comments:

Commentaires spéciaux :

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?  
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? ☒ No ☐ Yes  
Non Oui

If Yes, will unscreened personnel be escorted?

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

**PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)**

**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?  
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? ☐ No ☒ Yes  
Non Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?  
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? ☒ No ☐ Yes  
Non Oui

**PRODUCTION**

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?  
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? ☒ No ☐ Yes  
Non Oui

**INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)**

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?  
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? ☐ No ☒ Yes  
Non Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?  
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? ☒ No ☐ Yes  
Non Oui





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

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL  CONFIDENTIEL	SECRET  TRÈS SECRET	TOP SECRET	NATO RESTRICTED  NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL  NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET  COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL  CONFIDENTIEL	SECRET	TOP SECRET  TRÈS SECRET
											A	B	C			
Information / Assets Renseignements / Biens Production					✓											
IT Media / Support TI					✓											
IT Link / Lien électronique																

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?

La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

☒ No  
Non ☐ Yes  
Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?

La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

☒ No  
Non ☐ Yes  
Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

## APPENDIX F - INFORMATION RELATED TO SECURITY REQUIREMENTS

**Appendix F is included here to assist Proponents in their response to SRE 3.1.5 Security Requirement.**

**Please use the template provided below to input the required security information for the Proponent, Key Personnel and all Sub-Consultants/Specialists that will form part of the multi-disciplinary team as specified in Section 3.1.5 of the Submission Requirements and Evaluation. Please copy template as required.**

Proponent or Proponent member (if Joint Venture):	
Legal Name of Proponent:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	

If applicable – Joint Venture Proponent member	
Legal Name of Proponent member:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	

## APPENDIX F - INFORMATION RELATED TO SECURITY REQUIREMENTS

Sub-consultant/Specialist:	
Legal Name of Sub-consultant/Specialist:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	

Sub-consultant/Specialist:	
Legal Name of Sub-consultant/Specialist:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	

Sub-consultant/Specialist:	
Legal Name of Sub-consultant/Specialist:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	

Sub-consultant/Specialist:	
Legal Name of Sub-consultant/Specialist:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	

## APPENDIX F - INFORMATION RELATED TO SECURITY REQUIREMENTS

Key Discipline Individuals:	
Legal Name of Individual:	
Date of Birth:	
Name of Employer and Workplace Address:	
Telephone Number:	
Clearance Level:	

Key Discipline Individuals:	
Legal Name of Individual:	
Date of Birth:	
Name of Employer and Workplace Address:	
Telephone Number:	
Clearance Level:	

Key Discipline Individuals:	
Legal Name of Individual:	
Date of Birth:	
Name of Employer and Workplace Address:	
Telephone Number:	
Clearance Level:	

Key Discipline Individuals:	
Legal Name of Individual:	
Date of Birth:	
Name of Employer and Workplace Address:	
Telephone Number:	
Clearance Level:	

**APPENDIX G**  
**TASK AUTHORIZATION FORM**

**Contract Number**

**Task Authorization (TA) No.**

**Contractor's Name and Address**

**Original Authorization**

Total Estimated Cost of Task (GST/HST extra) before any revisions:

\$

**TA Revisions Previously Authorized (as applicable) - Révisions de l'AT autorisées précédemment (s'il y a lieu)**

TA Revision No.

Authorized Increase or Decrease (GST/HST extra):  
\$

TA Revision No.

Authorized Increase or Decrease (GST/HST extra):  
\$

TA Revision No.

Authorized Increase or Decrease (GST/HST extra):  
\$

**New TA Revision (as applicable)**

TA Revision No.

Authorized Increase or Decrease (GST/HST extra):  
\$

Total Estimated Cost of Task (GST/HST extra) after this revision:

\$

**Contract Security Requirements (as applicable)**

☐ No

☐ Yes. Refer to the Security Requirements Checklist (SRCL) annex of the Contract.

This task includes security requirements.

Remarks (as applicable)

**Required Work**

**SECTION A - Task Description of the Work required**

<b>SECTION B - <u>Applicable Basis of Payment</u></b>
<b>SECTION C - <u>Cost Breakdown of Task</u></b>
<b>SECTION D - <u>Applicable Method of Payment</u></b>
<b>Authorization</b>
<p><b>By signing this TA, the Project Authority or the PWGSC Contracting Authority or both, as applicable, certify (ies) that the content of this TA is in accordance with the Contract.</b></p> <p>Name of Project Authority</p> <p>Signature _____ Date _____</p> <p>Name of PWGSC Contracting Authority -</p> <p>Signature _____ Date _____</p>
<b>Contractor's Signature</b>
<p>Name and title of individual authorized to sign for the Contractor</p> <p>_____</p> <p>Signature _____ Date _____</p>

## SUBMISSION REQUIREMENTS AND EVALUATION

### SRE 1: GENERAL INFORMATION

#### REFERENCE TO THE SELECTION PROCEDURE

An 'overview of the selection procedure' can be found in R1410 General Instructions (GI 3), as modified in **SI2 Proposal Documents**.

#### 1.1 CALCULATION OF TOTAL SCORE

For this project the Total Score will be established as follows:

Technical Rating x 65%	=	Technical Score (Points)
Aboriginal Participation Plan x 5%	=	Socio-economic criteria Score (Points)
Presentation Rating x 10%	=	Presentation Score (Points)
<u>Price Rating x 20%</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 RFP:

- Submit one (1) bound signed original plus six (6) bound copies of the proposal
- Paper size should be - 216mm x 279mm (8.5" x 11") unless specified otherwise
- Minimum font size - 11 point Times or equal
- Minimum margins - 12 mm left, right, top, and bottom
- Double-sided submissions are preferred
- One (1) 'page' means one side of a 216mm x 279mm (8.5" x 11") sheet of paper
- 279mm x 432 mm (11" x 17") fold-out sheets for spreadsheets, organization charts, etc. will be counted as two pages.
- The order of the proposal should follow the order established in the Request for Proposal SRE section.

To assist Canada in reaching its sustainable procurement objectives, bidders should:

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

## SUBMISSION REQUIREMENTS AND EVALUATION

---

### 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 to 3.6 is eighty (80) pages.

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

- Covering letter
- Mandatory Requirements listed in section SRE 3.1, sub-sections SRE 3.1.1 to 3.1.8 inclusive (only if provided separately from Rated Requirements):
  - i) Licensing, Certification or Authorization
  - ii) Consultant Team Identification (Appendix A)
  - iii) Declaration Form (Appendix B)
  - iv) Integrity Provisions – Required Documentation
  - v) Information related to Security Requirement (Appendix F)
- Aboriginal Participation Plan in section SRE 5
- Front page of the Solicitation Document (RFP)
- Front page of all Solicitation Amendment(s), if any
- Price Proposal Form (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.***



## **SUBMISSION REQUIREMENTS AND EVALUATION**

---

### **SRE 3: SUBMISSION REQUIREMENTS AND EVALUATION**

#### **3.1 MANDATORY REQUIREMENTS**

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

##### **3.1.1 Licensing, Certification or Authorization**

The Proponent and all members of the Proponent's Consultant Team shall be, or eligible to be licensed, certified and/or authorized to provide the necessary professional services to the full extent that may be required by provincial law in the province of Ontario.

##### **3.1.2 Consultant Team Identification**

PWGSC is seeking a multi-disciplinary Consulting Team as follows:

a) Proponent (Prime Consultant):

- Architect and Urban Planner

b) Key Subconsultant/Specialist Firms

- Advocate Architect
- Urban Design
- Landscape Architecture
- Sustainability Specialist
- Security Specialist
- Heritage Specialist
- Civil Engineering
- Structural Engineering
- Mechanical Engineering
- Electrical Engineering

If the proponent proposes to provide multidisciplinary or specialist services that are to be provided by a sub-consultant, this should be indicated in the proposal.

c) Key Discipline Individuals

1. Principle in charge/ Project Manager
2. Primary Senior Project Architect <sup>(1)</sup>
3. Lead Advocate Architect
4. Lead Urban Designer
5. Lead Urban Planner
6. Lead Landscape Architect
7. Lead Heritage Conservation Specialist
8. Lead Structural Engineer
9. Lead Mechanical Engineer

## SUBMISSION REQUIREMENTS AND EVALUATION

---

10. Lead Electrical Engineer
11. Lead Sustainability specialist
12. Lead Security Specialist
13. Lead Transportation Engineer

Note (1): While the Services described in the Project Brief will necessarily involve a number of Architects, the term "Primary Senior Project Architect" refers to a licensed professional, with significant technical and professional expertise, who will be the primary assigned individual to technically lead in a hands-on manner, the individual Task Authorization assignments undertaken under Stream 2 of the Required Services. Notwithstanding the foregoing, this senior professional is not excluded from supporting the Services rendered under Stream 1 and Stream 3 of the Required Services.

Information required - name of firm, Key Discipline Individuals to be assigned to the project. In the case of a Joint Venture, identify the existing or proposed legal form of the Joint Venture (refer to R1410 General Instructions (GI9): Limitation of Submissions)

A description of the role, experience and licensing/certification requirements for all Consultant Team resources is provided in Annex D of the Project Brief.

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

### **3.13 Declaration/Certification Form(s)**

Proponents must complete, sign and submit the following:

- Declaration Forms found in Appendix B.

### **3.14 Integrity Provisions – Require 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 R110T (2016-04-04), General Instructions 1 (GI1), Integrity Provisions – Proposal, section 3a.

### **3.15 Security Requirement**

#### **1) Before award of a contract, the following conditions must be met:**

- a. The Proponent and the following Sub-consultants/Specialists must meet the following security requirement:

## SUBMISSION REQUIREMENTS AND EVALUATION

Proponent/Sub-consultant/Specialists (Firms)	Security Clearance (FSC Secret) at Contract Award
Proponent (Prime Consultant)	X
Advocate Architect	X
Urban Design	X
Landscape Architecture	X
Heritage Specialist	X
Civil Engineer	X
Structural Engineer	X
Mechanical Engineer	X
Electrical Engineer	X
Sustainability Specialist	X
Security Specialist	X
Material Handling Specialist	X
Transportation Engineer	X
Blast/Ballistics Engineer	X

**All other Sub-consultants/Specialists forming part of the Proponent's Stream 1 team, as determined by the Proponent as necessary to complete the Stream 1 Required Services, must hold a valid Designated Organization Screening.**

To help PWGSC with the verification process, Proponents are being asked to complete the template included in Appendix F.

If the required security information is not provided as per Appendix F, Canada will inform the Proponent of a time frame within which to provide the information. Failure to comply will render the proposal non-responsive. Canada will not delay the award of the contract to allow the Proponent to meet the required security requirement.

- b. The Proponent Key Discipline Individuals must meet the following security requirement:

Key Discipline Individuals	Security Clearance (Secret) at Contract Award
Principle in Charge/ Project Manager	X
Senior Project Architect	X
Lead Advocate Architect	X
Lead Urban Designer	X
Lead Urban Planner	X
Lead Landscape Architect	X
Heritage Conservation Specialist	X
Lead Civil Engineer	X
Lead Structural Engineer	X

## SUBMISSION REQUIREMENTS AND EVALUATION

Lead Mechanical Engineer	X
Lead Electrical Engineer	X
Lead Sustainability Specialist	X
Lead Security Specialist	X
Lead Material Handling Specialist	X
Lead Transportation Specialist	X
Lead Blast/Ballistics Engineer	X

All other personnel not named above but that will form part of the multi-disciplinary Stream 1 team, as determined by the Proponent as necessary to complete Stream 1 Required Services, must meet a security clearance level of 'Reliability'.

To help PWGSC with the verification process, Proponents are being asked to complete Appendix F.

If the required security information is not provided as per Appendix F, Canada will inform the Proponent of a time frame within which to provide the information. Failure to comply will render the proposal non-responsive. Canada will not delay the award of the contract to allow the Proponent to meet the required security requirement.

### 316 Stream 1 (Master Planning) Mandatory Experience

The proposal must demonstrate the Proponent's experience in delivering a project of a scope and nature similar to that described in Required Services-Stream 1 section of the Project Brief. To this end, the Proponent is to provide a reference project meeting the following mandatory requirements:

Stream 1 Mandatory Project Requirements		PASS	FAIL
1.	Project is a Master Development Plan		
2.	Project was completed within the last 10 years (between January 2008 and December 2017)		
3.	Project was undertaken by the Proponent in capacity of Prime Consultant		
4.	Project area/boundaries consists of existing buildings and open spaces in an urban environment		
5.	Project description demonstrates growth projections and accommodations		
6.	Project description demonstrates integration of land-uses and patterns		
7.	Project description demonstrates movement and transportation		
8.	Project description demonstrates landscape and open space		
9.	Project description demonstrates integration of infill development		

## SUBMISSION REQUIREMENTS AND EVALUATION

	within built-up areas		
10.	Project description demonstrates sustainability		
11.	Project was completed on behalf of an institutional client (e.g. Government, research, university or teaching, healthcare)		
12.	The Proponent must substantiate the above by providing the following information:		
a)	A brief description of the project substantiating criteria 1 through 11 above		
b)	A list of senior and project personnel is provided, which includes at least one Key Discipline Individual identified under 3.1.2 c)		
c)	The project completion date to demonstrate that the project was completed within the last 10 years		
d)	Scope of services and key deliverables		

It is recommended to submit this information using two (2) pages.

### 3.1.7 Stream 2 (General Architectural & Engineering Services) Mandatory Experience

The proposal must demonstrate the Proponent's experience in providing a broad range of multi-disciplinary architectural and engineering services by providing a reference project meeting the following mandatory requirements:

Stream 2 Mandatory Project Requirements		PASS	FAIL
1.	The project was completed by the Proponent in the capacity of Prime Consultant		
2.	The project includes the provision of full multi-disciplinary services covering all project stages (pre-design, design and construction stage services)		
3.	The project has at least reached Substantial Completion within the past ten (10) years as of bid closing		
4.	The construction value of the project must be at least \$10 million (in 2017 dollars)		
5.	The project was completed on behalf of a federal government department		
6.	The project demonstrates a level of complexity including ALL of the following:		
a)	Complex client context (e.g. complex functional program or, work in occupied operational facilities, or, tight security constraints)		
b)	Significant technical and engineering complexity, including Mechanical, Electrical and Structural retrofits		

## SUBMISSION REQUIREMENTS AND EVALUATION

c)	Heritage characteristics including a formal Review of Intervention by the FHRBO or equivalent		
7.	The Proponent must substantiate the above by providing the following information:		
a)	A brief description of the project including a thorough and unambiguous substantiation of criteria 1 to 6 listed above		
b)	The names of senior personnel and/or project personnel who were involved as part of the project team. Referenced individuals shall include at least one of the Key Discipline Individuals listed under 3.1.2 c)		
c)	The start date, Substantial Completion Date and completion date of construction to demonstrate that the project was at least substantially completed within the past 10 years as of Bid Closing		
d)	Scope of services and key deliverables		

It is recommended to submit this information using a maximum of two (2) pages.

### 318 Stream 3 (Advocate Architect) Mandatory Experience

The proposal must demonstrate that the Proponent or Sub-Consultant / Specialist's experience in providing Advocate Architect services (also referred to as Compliance Architect) by providing a reference project meeting the following mandatory requirements:

Stream 3 Mandatory Project Requirements		PASS	FAIL
1.	The project must include the provision of architectural advocacy services during the phases of pre-procurement, procurement, design and construction		
2.	The project was undertaken by the Proponent or one of his Key Subconsultants/Specialists, as Prime Consultant to the Owner		
3.	The project must have at least reached substantial completion by the date of closing of this RFP		
4.	The reference project must be related to building type office space accommodation (Not engineering infrastructure, civil works or sports facility)		
5.	The reference project was undertaken as a Design-Build, or an Alternate Form of Procurement		
6.	The reference project was undertaken for an Institutional or Public Sector entity (Federal, Provincial or Municipal or where the majority of the funding has been provided by the public sector)		

## SUBMISSION REQUIREMENTS AND EVALUATION

7.	The capital construction cost of the project must be at least \$100 million in 2017 dollars		
8.	The Proponent must substantiate the above by providing the following information:		
a)	A brief description of the project, including an unambiguous demonstration that the reference project meets criteria 1 to 7 identified above		
b)	The names of senior personnel and/or project personnel who were involved as part of the project team. Referenced individuals shall include at least one of the Key Discipline Individuals listed under 3.1.2 c)		
c)	The start date, Substantial Completion Date and completion date of construction to demonstrate that the project was at least substantially completed within the past 10 years as of Bid Closing		
d)	Scope of services and key deliverables		

It is recommended to submit this information using a maximum of two (2) pages.

## SUBMISSION REQUIREMENTS AND EVALUATION

---

### 3.2 RATED REQUIREMENTS – RATED PROJECTS (RP) COMPARABLE PROJECTS RELEVANT EXPERIENCE – PROPONENT –

PWGSC Evaluation Board Members will evaluate the strengths and weaknesses of the Proponent's response to the evaluation criteria and will rate each criterion (i.e. Relevance, Client Context, etc.) with an even percentage (0%, 20%, 40%, 60%, 80%, 100%) that represents the best fit for the selected percentage. The selected percentage will be multiplied by the corresponding Available Points to obtain the score for that criterion. This rating methodology applies to all rated requirements in SRE 3.2.

#### **321 RP1 - Achievements of Proponent on Projects relevant to Stream 1**

Describe the Proponent's accomplishments, achievements and experience on comparable projects to the Required Services – Stream 1 section of the Project Brief.

Describe three (3) urban planning studies completed within the last ten (10) years that will demonstrate the Proponent's past record of involvement on sensitive, high profile and challenging assignments in urban planning/design/landscape planning for public or private projects, preferably in an institutional setting and preferably involving heritage properties/assets. Joint Venture submissions are not to exceed the maximum number of studies.

The reference Projects submitted under this section may include the mandatory Project submitted under MP1.

It is recommended to submit a maximum of two (2) pages per projects, for a total of six (6) pages.

Information that should be supplied for each project:

1. Brief project description and intent. Narratives should include a discussion of how the clients' planning priorities, future growth and accommodations projections, public consultation and stakeholder engagement initiatives, project budgets, environmental (sustainable) goals, schedule and operational objectives were satisfied by the overall planning process and solution.
2. Clearly indicate how this project is comparable/relevant to the Parliamentary Campus Master Plan as described in the RFP (e.g. role, size, scale, complexity, etc.)
3. Demonstrate experience in management of consultation process in a complex stakeholder environment.
4. Project schedule control and management - i.e. initial schedule and revised schedule and explain variation.
5. Client references
6. Names of sub-consultants and key personnel responsible for project delivery
7. Awards received, if applicable

The above criteria will be evaluated in accordance with Scale RP1 below.



## SUBMISSION REQUIREMENTS AND EVALUATION

Scale RP1	Achievements of Proponent on Projects <u>relevant to Stream 1</u>						
	0 %	20 %	40 %	60 %	80 %	100 %	Available Points
Relevance	Services provided are not related to urban planning project size, scale and complexity is not relevant to the Project Brief  Was not undertaken by the Proponent (as defined under 3.1.2)  Is not related to an institutional setting	Services provided are marginally related to urban planning  Project size, scale and complexity is marginally relevant to the Project Brief  Was undertaken by the Proponent in capacity other than Prime Consultant	Services provided are somewhat related to urban planning  Project size, scale and complexity is somewhat relevant to the Project Brief  Proponent shared responsibilities as Prime Consultant  Completed on behalf of an institutional client but no direct relevance to this assignment	Services provided are generally related to urban planning  Project size, scale and complexity is generally relevant to the Project Brief  Proponent shared responsibilities as Prime Consultant  Completed on behalf of an institutional client with some direct relevance to this assignment	Services provided are related to urban planning  Project size, scale and complexity is relevant to the Project Brief  Undertaken by the Proponent as Prime Consultant  Completed on behalf of an institutional client with relevance to this assignment	Services provided are directly related to urban planning  Project size, scale and complexity is directly relevant to the Project Brief  Undertaken by Proponent as Prime Consultant  Completed on behalf of an institutional client with the most direct relevance to this assignment	15 points per project  45 points total
Client context	Does not describe the stakeholder environment  Does not address Stakeholder engagement  Does not describe consultation process with stakeholders  Does not address the planning priorities of the client and future growth and accommodations projections	Complexity of stakeholder environment is not well described  Description lacks detail of Stakeholder engagement  Description lacks detail of consultation process with stakeholders  Description lacks detail as to how the client's priorities and accommodations projections have been addressed.	Stakeholder environment is somewhat complex  Description demonstrates a minimum level of Stakeholder engagement  Description somewhat describes the consultation process with stakeholders  Somewhat describes how the project has addressed the clients planning priorities and future growth and accommodations projections,	Adequate demonstration of a Complex stakeholder environment  Description demonstrates some level of Stakeholder engagement  Description adequately describes the consultation process with stakeholders  Description adequately describes how the project has addressed the clients planning priorities and future growth and accommodations projections	Good demonstration of a Complex stakeholder environment  Good demonstrate a high level of Stakeholder engagement  Well described consultation process with stakeholders  Description well describes how the project has addressed the clients planning priorities and future growth and accommodations projections	Clearly demonstrates a Complex stakeholder environment  Clearly demonstrate a high level of Stakeholder engagement  Clearly describes an inclusive and thorough consultation process  Description clearly describes how the project has effectively addressed the clients planning priorities and future growth and accommodations projections	15 points per project  45points total
Project attributes	Project primarily includes residential type development  Project is a green-field setting  Project does not have sustainability constraints	Project is in a suburban setting  Is mostly related to new development in a green-field setting  Does not address adequately sustainability considerations	Project is partly in an outer-urban setting  Is mostly related to new development in a green-field setting  Addresses sustainability considerations	Project is in an urban setting  Includes minimal integration of existing properties/assets  Includes well-articulated sustainability considerations	Project is in an urban setting  Includes the integration of existing properties/assets  Includes well-articulated sustainability strategy	Project setting is a significant Urban campus setting, and includes interconnections between buildings and functions  Includes the integration of heritage properties/assets  Includes progressive and leading edge sustainability strategy	10 points per project  30 points total
Project Management and Experience (Working with )	Proponent did not have a project management role	Proponent did not sufficiently demonstrate a project management role	Proponent demonstrated limited project management role and experience	Proponent demonstrated satisfactory project management role and experience	Proponent demonstrated strong project management role and experience	Proponent demonstrated strong and successful project management role and experience	5 points per project

## SUBMISSION REQUIREMENTS AND EVALUATION

	Multi-Disciplinary team was composed of only 1 key discipline specialists listed in this RFP in section 3.1.2.b)	Multi-Disciplinary team was composed of a minimum of 2 key discipline specialists listed in this RFP in section 3.1.2.b)	Multi-Disciplinary team was composed of a minimum of 3 key discipline specialists listed in this RFP in section 3.1.2.b)	Multi-Disciplinary team was composed of a minimum of 4 key discipline specialists listed in this RFP in section 3.1.2.b)	Multi-Disciplinary team was composed of a minimum of 5 key discipline specialists listed in this RFP in section 3.1.2.b)	Multi-Disciplinary team was composed of a minimum of 6 key discipline specialists listed in this RFP in section 3.1.2.b)	15 points total
					A minimum of 1 of the listed sub-consultant entities or key individuals are entities or personnel identified in the RFP (reference 3.1.2 b) and 3.1.2 c))	A minimum of 1 of the listed sub-consultant entities or key individuals are entities or personnel identified in the RFP (reference 3.1.2 b) and 3.1.2 c))	
Quality	No recognition for design excellence	NA	NA	NAN/A	NA N/A	Has been recognized for excellence in design by a professional organization/institute in the field of Architecture, Urban Planning and Design or Landscape Architecture	5 points per project 15points total
50 points per projects x 3 projects = (150 points max point) = Score this section							150

### 322 RP2 - Achievements of Proponent on Projects relevant to Stream 2

Describe the Proponent's accomplishments, achievements and experience on past projects where services rendered are comparable to the Required Services – Stream 2 section of the Project Brief.

Describe three (3) significant projects completed within the last ten (10) years that will demonstrate the Proponent's past record of involvement in projects requiring a broad range of multi-disciplinary architectural and engineering services and other specialized services as described in the Required Services – Stream 2 section of the Project Brief.

The reference Projects submitted under this section may include the mandatory Project submitted under MP2.

Joint Venture submissions are not to exceed the maximum number of projects. It is recommended to submit a maximum of two (2) pages per projects, for a total of six (6) pages.

With respect to the projects described, the Proponent should demonstrate that:

- Projects should preferably include the full scope of Basic Services described in the Required Services – Stream 2 section of the Project Brief and;
- The projects submitted should preferably have been undertaken by the Proponent (or one of its JV entities in case of a JV), as a Prime Consultant.
- The construction value of the three (3) projects (Actual construction value when projects have been realized or Indicative Class estimate of construction) should preferably be a minimum of \$5 million individually;
- Projects should have preferably at least reached Design Development;

## SUBMISSION REQUIREMENTS AND EVALUATION

---

- Projects should preferably involve an intervention on a Heritage Building. In this context, the definition of Heritage Building shall follow the Canadian Historic Places Register, applicable Provincial equivalent or any equivalent national level designation for projects outside Canada.

The project description should clearly demonstrate that the Proponent has experience in projects which include the following Complexity Characteristics:

- i. Heritage conservation
- ii. Abatement of hazardous materials and selective demolition
- iii. External Stakeholder involvement
- iv. Management of multi-disciplinary project teams
- v. Physical Security
- vi. Seismic upgrading
- vii. Sustainability design
- viii. Work undertaken in an operational facility, or occupied building

### Information that should be supplied for each project:

1. Project title, location, building program, building size, year started, year completed (or substantial completion date, if applicable), construction value;
2. If applicable, identify those projects which were carried out in joint venture, partnership or otherwise with a third party or parties, and describe the responsibilities of each of the involved entities;
3. Brief project description. Narratives should include a description of design philosophy and approach, scope of services rendered, project objectives, constraints, risks and deliverables;
4. Clearly indicate how the project is comparable/relevant to the Required Services – Stream 2 section of the Project Brief and Complexity Characteristics i) to viii) listed above;
5. Brief description of budget control and management methodology (including without limitation, the contract price, the final (or Substantial Performance) construction cost, and if applicable, an explanation of any variation);
6. Brief description of project schedule control and management methodology (including without limitation, the initial schedule, any revised schedule(s), and if applicable, an explanation of any variation);
7. Names of key personnel responsible for project delivery, including correlation with Key Discipline Individuals identified in Section 3.1.2 c), as applicable;
8. Client references
9. Awards received, if applicable

The above criteria will be evaluated in accordance with Scale RP2 below.

## SUBMISSION REQUIREMENTS AND EVALUATION

Scale RP2	Achievements of Proponent on Projects <u>relevant to Stream 2</u>						Available Points
	0	20 %	40 %	60 %	80 %	100 %	
Relevance	Nature of Services provided is ambiguous or unclear  Project value is not identified  Narrative and description is missing.  Project is not relevant.	Nature of Services provided are unclear  Project value is significantly less than \$5M in construction (2017 dollars)  Narrative and description lacks significant information or is very generic.  Project is marginally relevant to Stream 2 Required Services in nature and breadth of services provided	Services provided as sub-consultant  Project value is less than \$5M in construction (2017 dollars)  Narrative provides most information with some significant gaps  Project is not quite relevant to Stream 2 Required Services in nature and breadth of services provided	Services provided as sub-consultant/Associate architect/or in Joint Venture  Project value is \$5M in construction (2017 dollars)  Narrative provides all requested information with some missing information  Project is somewhat relevant to Stream 2 Required Services in nature and breadth of services provided	Services provided as Prime Consultant  Project is over \$5M in construction (2017 dollars)  Project has reached Design Development  Narrative provides all requested information with only minor lack of information  Project is relevant to Stream 2 Required Services in nature and breadth of services provided	Services provided as Prime Consultant  Project is significantly over \$5M in construction (2017 dollars)  Project has reached Substantial Completion  Narrative provides all requested information with little to no lack of supporting information  Project is directly relevant to Stream 2 Required Services in nature and breadth of services provided	15 points per project  45 points total
Attributes	Project involves at most 1 Complexity Characteristic  Information provided is insufficient to assess	Project involves at most 1 complexity characteristic Project is not an intervention on a Heritage Building (as defined in section 3.2.2)  Project involves at most 1 Complexity Characteristic  Project description provides minimal information	Project is not an intervention on a Heritage Building (as defined in section 3.2.2)  Project involves at most 2 Complexity Characteristics  Project description outlines only basic information in a generic manner.	Project is an intervention on a Heritage Building (as defined in section 3.2.2)  Project involves at least 3 Complexity Characteristics  Project description outlines only some of the information sought.	Project is an intervention on a Heritage Building (as defined in section 3.2.2)  Project involves at least 3 Complexity Characteristics  Project description generally outlines most of the information sought	Project is an intervention on a significant Heritage Building (as defined in section 3.2.2)  Project involves at least 4 Complexity Characteristics  Project description thoroughly outlines all the information sought	15 points per project  45 points total
Management	No discussion of cost and schedule control/methodology or capacity and skills not demonstrated  Project personnel is missing. Project personnel does not include any Key Discipline Individuals (Section 3.1.2 c)  Supporting information missing altogether in some areas.	Information provides evidence of marginal capacity and skills related to cost and schedule control/methodology  No correlation between project personnel and Key Discipline Individuals (Section 3.1.2 c)  Supporting information lacking	Information provides evidence of some capacity and skills related to cost and schedule control/methodology.  Referenced project personnel included no more than 1 Key Discipline Individuals (Section 3.1.2 c)  Supporting information is missing significant information	Information provides evidence of reasonable capacity and skills related to cost and schedule control.  Referenced project personnel included no more than 2 Key Discipline Individuals (Section 3.1.2 c)  Supporting information is missing some key elements	Information provides evidence of good capacity and skills related to cost and schedule control.  Referenced project personnel included more than 2 Key Discipline Individuals (Section 3.1.2 c)  Supporting information is sufficiently complete	Excellent PM track record. Information provided supports excellent cost and schedule control capacity.  Referenced project personnel included more than 3 Key Discipline Individuals (Section 3.1.2 c)  Supporting information is thorough and complete	15 points per project  45 points total
Quality	No recognition for design excellence	NA	NA	NA	NA	Has been recognized for excellence in design solution by a professional organization/institute in the field of Architecture, Engineering, Urban Design, Urban Planning or Landscape Architecture	5 points per project  15 points total
<b>50 points per project x 3 projects = 150 point max = Score this section</b>							<b>150</b>

## SUBMISSION REQUIREMENTS AND EVALUATION

---

### **323 RP3 - Achievements of Proponent on Projects relevant to Stream 3**

Describe the Proponent's accomplishments, achievements and experience on comparable projects to the Required Services – Stream 3 section of the Project Brief.

Describe three (3) significant projects completed within the last ten (10) years that will demonstrate the Proponent's past record of experience as Advocate Architect providing services similar to those described in the Required Services – Stream 3 section of the Project Brief.

The reference Projects submitted under this section may include the mandatory Project submitted under MP3.

Joint Venture submissions are not to exceed the maximum number of projects.

It is recommended to submit a maximum of two (2) pages per projects, for a total of six (6) pages.

With respect to the projects described, the Proponent should demonstrate that:

- At Bid Closing, all projects should preferably have at least completed Pre-Procurement phase activities ( RFP ready);
- All Projects preferably have a minimum construction value (Estimated or actual) of at least \$50M in 2017 dollars.
- Projects are preferably accommodation/workplace type facilities

The project description should clearly demonstrate that the Proponent has experience acting in the role of Advocate Architect (Owner's Advocate or similar title) in projects which include the following Complexity Characteristics:

- i. Engagement of multi-stakeholder interest
- ii. Management of multi-disciplinary project teams from planning to post-occupancy stages
- iii. Significant complexity in security design requirements
- iv. Significant complexity in retrofit or adaptive re-use of existing buildings
- v. Significant complexity in heritage considerations
- vi. Significant sustainability design requirements

Information that should be supplied for each project:

1. Project title, location, building program, building size, year started, year completed (or substantial completion date, if applicable), construction value;
2. If applicable, identify those projects which were carried out in joint venture, partnership or otherwise with a third party or parties and describe the responsibilities of each of the involved entities;

## **SUBMISSION REQUIREMENTS AND EVALUATION**

---

3. Brief project description. Narratives should include a description of design philosophy and approach, scope of services rendered, project objectives, constraints, risks and deliverables;
4. Clearly indicate how this project is comparable/relevant to the Required Services – Stream 3 of the Project Brief and the Complexity Characteristics i) to vi) listed above;
5. Brief description of, in an Advocacy role, what were the responsibilities regarding budget setting / control and management methodology (including without limitation, the pre-procurement estimate (construction), the construction costs agreed at Financial Close, and any agreed upon construction cost adjustment including an explanation of the variance);
6. Names of key personnel responsible for project delivery, including correlation to Key Discipline Individuals identified in Section 3.1.2 c);
7. Client references

The above criteria will be evaluated in accordance with Scale RP3 below.

## SUBMISSION REQUIREMENTS AND EVALUATION

Scale RP3	Achievements of Proponent on Projects relevant to Stream 3						Available Points
	0 %	20 %	40 %	60 %	80 %	100 %	
Relevance	<p>Nature of Services provided is ambiguous or unclear</p> <p>Nature of Project and value is not identified</p> <p>Narrative and description is missing.</p> <p>Nature of Project is not relevant.</p>	<p>Nature of Services provided are lacking clarity</p> <p>Nature of involvement or Project value is unclear</p> <p>Narrative and description lacks significant information or is very generic.</p>	<p>Services are provided to a Design Builder</p> <p>Services provided include at least Pre-Procurement Phase</p> <p>Project value is less than \$25M</p> <p>Narrative provides most information with some significant gaps</p>	<p>Services provided as AA team member</p> <p>Services provided include Procurement Phase</p> <p>Project value is less than \$50M in construction (2017 dollars)</p> <p>Narrative provides all requested information with some missing information</p>	<p>Services provided as AFP AA Prime Consultant</p> <p>Services provided include Design and Construction Phase</p> <p>Project is over \$50M in construction (2017 dollars)</p> <p>Project has not yet reached substantial completion</p> <p>Narrative provides all requested information with only minor lack of information</p>	<p>Services provided as AFP AA Prime Consultant</p> <p>Services provided extend through all phases including Post-Construction</p> <p>Project is significantly over \$50M in construction (2017 dollars)</p> <p>Project has reached substantial completion</p> <p>Narrative provides all requested information with little to no lack of supporting information</p>	<p>20 points per project</p> <p>60 points total</p>
Attributes	<p>Project description significantly missing in information.</p>	<p>Project is primarily an industrial storage type facility</p> <p>Project does not reference Complexity Characteristics</p> <p>Project description outlines only basic information</p>	<p>Project is not primarily a workplace/office type facility (eg. sports / industrial/military)</p> <p>Project involves at most 1 Complexity Characteristic</p> <p>Project description outlines limited information in a generic manner.</p>	<p>Project is not primarily a workplace/office type facility (eg. sports / industrial/military)</p> <p>Project involves at most 2 Complexity Characteristics</p> <p>Project description generally outlines most of the information sought</p>	<p>Project includes a significant workplace type component</p> <p>Project involves at least 2 Complexity Characteristics</p> <p>Project description generally outlines most of the information sought</p>	<p>Project is primarily a workplace type facility</p> <p>Project involves at least 3 Complexity Characteristics</p> <p>Project description thoroughly outlines all the information sought</p>	<p>15 points per project</p> <p>45 points total</p>
Management	<p>No discussion of cost and schedule control/methodology</p> <p>Project personnel is missing</p> <p>Supporting</p>	<p>Very basic information on cost and schedule control/methodology</p> <p>No correlation between project personnel and Key Discipline</p>	<p>Information does not fully evidence capacity and skills in cost and schedule control.</p> <p>Referenced project personnel included no more than 1 Key Discipline Individuals</p>	<p>Information provides evidence of reasonable capacity and skills in cost and schedule control.</p> <p>Referenced project personnel included no more than 2 Key</p>	<p>Information provides evidence of good capacity and skills related to cost and schedule control.</p> <p>Referenced project personnel</p>	<p>Excellent track record. Information provided supports excellent capacity and skills in cost and schedule control.</p> <p>Referenced</p>	<p>15 points per project</p> <p>45 points total</p>

## SUBMISSION REQUIREMENTS AND EVALUATION

	information missing altogether in some areas.	Individuals (Section 3.1.2 c)  Supporting information lacking	(Section 3.1.2 c)  Supporting information is missing significant information	Discipline Individuals (Section 3.1.2 c)  Supporting information is missing some key elements	included more than 2 Key Discipline Individuals (Section 3.1.2 c)  Supporting information is sufficiently complete	project personnel included more than 3 Key Discipline Individuals (Section 3.1.2 c)  Supporting information is thorough and complete	
<b>50 points per projects x 3 projects = (150 points max point) = Score this section</b>							<b>150</b>



## **SUBMISSION REQUIREMENTS AND EVALUATION**

---

### **3.3 RATED REQUIREMENTS – RATED PROJECTS (RP) COMPARABLE PROJECTS RELEVANT EXPERIENCE – KEY SUB-CONSULTANTS AND/OR SPECIALISTS–**

This requirement will assess the past experience of the Proponent's Key Sub-Consultants and Specialists as it applies and is specifically relevant to each Stream.

#### **331 RP4 Achievements of Key Sub-consultants and/or Specialists on Projects relevant to Stream 1**

This section will assess the broader team, the experience of working in a multi-disciplinary team environment and specifically the Key Sub-Consultants and/or Specialists relevant to Stream 1, in the areas of:

- Urban Design
- Landscape Architecture

If the Proponent proposes to provide multi-disciplinary services which might otherwise be performed by a Sub-consultant or Specialist, this should be reflected here by outlining the expertise of the in-house specialists.

Submit a total of three (3) projects, undertaken within the last ten (10) years that describe the accomplishments, achievements and experience in the field of Urban Design and Landscape Architecture. The reference projects should demonstrate past record of involvement on sensitive, high profile and challenging assignments in urban design/landscape planning for public or private projects, preferably involving progressive sustainability considerations and heritage properties/assets.

It is recommended to submit a maximum of two (2) pages per projects, for a total of six (6) pages.

The above criteria will be evaluated in accordance with Scale RP4 below:

## SUBMISSION REQUIREMENTS AND EVALUATION

RP4	Achievement of Key Sub-Consultants and/or Specialists on Projects relevant to Stream 1	Rating Score
<p>A demonstration of the relevant experience of key Specialists in the area of Urban Design and Landscape Architecture</p>	<p>This criterion assesses the relevant experience of Key Sub-Consultants or Specialists in the areas of Urban Design and Landscape Architecture.</p> <p>Submit a total of 3 reference projects :</p> <ul style="list-style-type: none"> <li>a) Brief project description and intent. Narratives should include a discussion of how the clients' program, functional, image, mission, economic, environmental (sustainable), schedule, and operational objectives were satisfied by the overall design/ planning solution, and;</li> <li>b) For each referenced project, the description should be explicit and specific enough to make direct linkages of relevance to the services identified in the Project Brief – Stream 1, and;</li> <li>c) Clearly indicate how this project is comparable/relevant to the subject project.</li> <li>d) Names of project key personnel responsible for Project delivery</li> <li>e) Awards received, if applicable.</li> <li>f) For each reference project, provide Client references - name, phone and e-mail</li> </ul>	<p>Maximum 50 points/ Project x 3 = 150 points</p> <p>100% Key Sub/Specialist is highly qualified and experienced. Reference project is entirely relevant and rationale is fully substantiated. Information is complete</p> <p>80% Key Sub/Specialist is qualified and experienced. Reference project is relevant and substantiated. Minor information is lacking</p> <p>60% Key Sub/Specialist is qualified and experienced. Reference project is somewhat relevant and substantiated. Some information is lacking</p> <p>40% Key Sub/Specialist is moderately qualified and experienced. Reference project is not quite relevant and substantial information is lacking.</p> <p>20% Key Sub/Specialist lacks previous experience in similar projects. Reference project is not relevant and information is significantly lacking or generic.</p> <p>0% Information is insufficient to properly assess</p>
<p><b>50 points per projects x 3 projects = 150 points max point this section</b></p>		<p><b>150</b></p>

## **SUBMISSION REQUIREMENTS AND EVALUATION**

---

### **332 RP5 Achievements of Key Sub-consultants and/or Specialists on Projects relevant to Stream 2 and 3**

This section will assess the experience of the Key Sub-Consultants and/or Specialist in the areas of:

- Mechanical Engineering
- Electrical Engineering
- Structural Engineering

If the Proponent proposes to provide multi-disciplinary services which might otherwise be performed by a Sub-consultant or Specialist, this should be reflected here by outlining the expertise of the in-house specialists.

Submit a total of three (3) projects, undertaken within the last ten (10) years, that describe the accomplishments, achievements and experience in the field of building related Engineering services (Mechanical, Electrical and Structural).

Reference projects should demonstrate past record of involvement on full service assignment, and a good understanding of working on sensitive and technically complex projects, in a Public Sector context (Municipal, Provincial, Federal, or accepted equivalents).

One (1) of the projects (Project #1) should outline previous experience in providing engineering related services as part of an Advocate Architect or compliance Engineering / Independent Engineer mandate service to the Owner. The project should have been delivered under an alternate form of delivery such as Design-Build, AFP or an accepted form of P3. The Engineering Specialist will not have been the Engineer of Record. The Project

- should be a building accommodation type of facility;
- should have reached Post-Construction phase (i.e. Substantial Completion) within the last 10 years, as of Bid Closing;
- should outline a high level of technical difficulty (Strict environmental controls, heritage constraints, includes retrofits of existing building, performance characteristics, building physical security measures)

The other two (2) projects (Project #2 and 3) should include the Basic Services described in the Required Services – Stream 2 section of the Project Brief and:

- should have a construction value of at least \$5 million;
- one of the projects should have been completed or at least reached Substantial Completion within the last 10 years, as of Bid Closing;
- should have involved the electro-mechanical systems retrofit of an existing building, including primary systems.
- should outline a level of technical difficulty (Strict environmental controls, heritage constraints, performance characteristics) or client context complexities (security

## SUBMISSION REQUIREMENTS AND EVALUATION

measures, work performed in an occupied facility, multiple stakeholder client)

It is recommended to submit a maximum of two (2) pages per project, for a total of six (6) pages.

The above criteria will be evaluated in accordance with Scale RP5 below:

RP5	Achievement of Key Sub-Consultants and/or Specialists on Projects relevant to Stream 2 & 3	Rating Score
A demonstration of the relevant experience of key Engineering Sub-Consultants / Specialists	<p>This criterion assesses the relevant experience of Key Engineering Sub-Consultants or Specialists in the areas of Mechanical, Electrical and Structural Engineering.</p> <p>Submit a total of 3 reference projects, covering all referenced disciplines:</p> <p><u>Information that should be supplied for each project:</u></p> <ol style="list-style-type: none"> <li>Project title, location, building program, building size, year started, year completed (or substantial completion date, if applicable), construction value;</li> <li>Brief project description. Narratives shall include, for each reference project, a description of the engineering design intent, approach, scope of services rendered, project objectives, constraints, risks and deliverables;</li> <li>A substantiation of how the project is comparable/relevant to the Required Services for Stream 2 and 3 described in Required Services – Stream 2/Stream 3 section of the Project Brief;</li> <li>For Project 1, brief description of role and responsibility, including participation in all phases of project development such as planning, design, construction and related compliance activities.</li> <li>For Project 2 &amp;3, brief description of budget management, construction cost, and if applicable, an explanation of any variation;</li> <li>For Project 2 &amp;3, brief description of project schedule management(including without limitation, the initial schedule, any revised schedule(s), and if applicable, an explanation of any variation);</li> <li>Names of key personnel responsible for project delivery;</li> <li>Client references</li> </ol>	<p>Maximum 50 points/ Project x 3 = 150 points</p> <p>100% Key Sub/Specialist is highly qualified and experienced. Reference project is entirely relevant and rationale is fully substantiated. Information is complete</p> <p>80% Key Sub/Specialist is qualified and experienced. Reference project is relevant and substantiated. Minor information is lacking</p> <p>60% Key Sub/Specialist is qualified and experienced. Reference project is somewhat relevant and substantiated. Some information is lacking</p> <p>40% Key Sub/Specialist is moderately qualified and experienced. Reference project is not quite relevant and substantial information is lacking.</p> <p>20% Key Sub/Specialist lacks previous experience in similar projects. Reference project is not relevant and information is significantly lacking or generic.</p> <p>0% Information is insufficient to properly assess</p>
<b>50 points per projects x 3 projects = 150 points max point this section</b>		<b>150</b>

## **SUBMISSION REQUIREMENTS AND EVALUATION**

---

### **3.4 RATED TECHNICAL REQUIREMENTS (RT), RT1 EXPERIENCE OF KEY DISCIPLINE INDIVIDUALS ON PAST PROJECTS.**

Describe the experience, expertise and performance of Key Discipline Individuals proposed to perform the services described in the Project Brief. This is the opportunity to emphasize the strengths of the individuals on the team and to recognize their past responsibilities, commitments and achievements, regardless of their past association with the current Proponent firm.

- Principle in charge/ Project Manager
- Senior Project Architect
- Lead Advocate Architect
- Lead Urban Designer
- Lead Urban Planner
- Lead Landscape Architect
- Lead Heritage Conservation specialist
- Lead Structural Engineer
- Lead Mechanical Engineer
- Lead Electrical Engineer
- Lead Sustainability specialist
- Lead Security Specialist
- Lead Transportation Engineer

For each Key Discipline Individual (13 in total), information should be presented in the form of a tailored Curriculum Vitae (CV) that clearly demonstrates the expertise of that individual. There must be no overlap or duplication of Key Discipline Individual function.

It is recommended to submit a maximum of two (2) pages per CV, for a total of 26 pages.

## SUBMISSION REQUIREMENTS AND EVALUATION

The information sought and scoring method shall be as follows:

RT1	EXPERIENCE OF KEY DISCIPLINE INDIVIDUALS <u>Information to be assessed, for each Key Discipline Individual</u>	Rating Score
A demonstration that the Proponent's proposed Key Discipline Individuals have the capability, capacity, expertise and relevant past experience to provide the required services and deliverables.	<p>This criterion assesses the professional accreditation, knowledge, past experience, expertise and completeness of skill sets of the Key Discipline Individuals assembled to carry out the services referenced in the Project Brief.</p> <p>For each Key Discipline Individual (x13), provide a tailored CV (recommended 2 pages per CV for max 26 pages overall covering all 13 individuals), indicating:</p> <ul style="list-style-type: none"> <li>a) Proposed role as part of the Proponent's team (from the list of Key Individuals), and;</li> <li>b) Degree of involvement in the proposed role</li> <li>c) Professional accreditation, and;</li> <li>d) Accomplishments/achievements/awards in their disciplines</li> <li>e) A demonstration of experience in their relevant discipline or specialty, including total number of years' experience, number of years' experience with firm, and number of years' experience as a discipline team leader.</li> <li>f) A substantiation of experience in a similar role by referencing at least 2 reference projects undertaken in the last 15 years, including general project description, specific responsibility of the individual on the referenced project and degree of involvement.</li> <li>g) For each referenced project, the description should be explicit and specific enough to make direct linkages of relevance to the services identified in the Project Brief. The description should include an outline of design philosophy or design intent, sustainability considerations, specific challenges and resolution.</li> <li>h) For each reference project, provide Client references - name, phone and e-mail</li> </ul>	<p><b>Maximum 10 points/ Key Discipline Individual x 13 = 130 points</b></p> <p><b>100%</b> Individual is highly qualified and experienced. Has significant experience in role. Past projects provide full substantiation of relevance in role. Individual has been directly involved in Reference Project (RP1 to RP5). Information is complete</p> <p><b>80%</b> Individual is qualified and experienced. Has some experience in role. Past project provide substantiation of relevance in role. Individual has been directly involved in Reference Project (RP1 to RP5) in senior capacity. Minor information is lacking</p> <p><b>60%</b> Individual is qualified and experienced. Has some experience in role. Individual has been involved in Reference Project (RP1 to RP5). Some information is lacking</p> <p><b>40%</b> Individual has some qualifications and experience, but lack adequate response in some of the required areas. Information provided is somewhat generic.</p> <p><b>20%</b> Individual does not possess qualifications and experience required. Reference project are unrelated to the Project Brief in their area of specialty. Information is significantly lacking or generic.</p> <p><b>0%</b> Information is insufficient to properly assess</p>

## SUBMISSION REQUIREMENTS AND EVALUATION

10 points per individual x 13 Key Disc. Ind = 130 points max point this section	130
---	-----

### 3.5

### 3.5 RATED TECHNICAL REQUIREMENTS (RT) – UNDERSTANDING OF THE PROJECT

This section will assess the Proponent's understanding of the Project based on the information provided in the Project Brief: This evaluation will only apply to services under Stream 1 and Stream 3

#### 3.5.1 RT2 Understanding of the Project relative to Stream 1

The uniqueness of the Parliamentary setting, the symbolic significance it represents to Canadians, the complexity of the accommodation planning issues and the national interest and visibility of the subject matter call for the highest level of creative thinking, innovative problem-solving, graphic expression and communication capabilities. The Proponent will be evaluated on the demonstration of their understanding of the goals of the project, the functional/ technical requirements, the constraints and the issues that will shape the end product.

This is the opportunity for the Proponent to outline a vision statement for the project, focusing on its unique aspects and opportunities, the approach to resolving issues and, in particular, to focus on the unique aspects of the current project.

The Proponent should elaborate on the importance of consultation and how to build and achieve consensus among the varied stakeholders and approval bodies as this will be an evaluated component.

The outline Vision Statement will present a clear design philosophy, approach and methodology and should address the following criteria;

- Include sustainability as a key foundation to urban design and planning
- Defining and developing a campus approach
- Enhancing and complementing the heritage character of the Precinct
- Incorporating innovation, excellence, forward thinking best practices
- Enhancing visitor experience

Given the highly participatory nature of Stream 1, engagement of public including children and youth, indigenous communities, partners and stakeholders will be key to the creation of a successful Campus Master Plan. To this end, the Proponent will articulate a strategy of how public engagement will be achieved with a draft Public Engagement Plan. The draft Public Engagement Plan will be evaluated on its ingenuity, creativity and comprehensiveness and identify major challenges, and opportunities.

It is recommended to submit the information using a maximum of five (5) pages.



## SUBMISSION REQUIREMENTS AND EVALUATION

The information sought and scoring method shall be as follows:

RT2	UNDERSTANDING OF THE PROJECT Stream 1 Services	Rating Score
A demonstration that the Proponent understands the overall requirements for the services described in the RFP related to Stream 1, including specific deliverables, expected approaches, technical expectations, and coordination requirements, especially in delivering federal government planning and site development projects.	<p>This criterion assesses the degree to which the proposal identifies and substantiates in detail the underlying functional and technical requirements along with the broader goals and objectives of identity and place making in the Parliamentary Precinct, and how to achieve consensus in multi-stakeholder, highly consultative environment.</p> <p><i>What the Proponent should provide:</i></p> <ul style="list-style-type: none"> <li>a) a description of the Proponent's understanding of stated project objectives, along with functional and technical requirements</li> <li>b) Broad considerations and goals (Capital context, historical significance, functional needs, sustainable development, campus setting, sensitivities, innovation etc.)</li> <li>c) The relationship between this project and any earlier studies completed for PWGSC as identified in Section 4.1.7.1 of the Project brief and other publicly available studies</li> <li>d) Planning context and authorities having jurisdiction</li> <li>e) Conceptual Planning and Master Plan or Demonstration Plan preparation</li> <li>f) An outline vision statement describing the design philosophy with respect to design quality and heritage character</li> <li>g) An understanding of the Client/User philosophies and values</li> <li>h) A demonstration of an understanding of the stakeholder environment and liaison, consultation, engagement presentations, review process, approvals</li> <li>i) The approach and importance of consensus building and workshop leadership</li> <li>j) Draft Engagement Plan</li> <li>k) Significant issues, challenges and constraints</li> </ul>	<p><b>Maximum 100 points</b></p> <p><b>100</b> Demonstrates an excellent understanding of the requirements and broad goals and objectives. Very clear and compelling philosophy and vision, approach and engagement plan. Excellent approach to consultation and achieving consensus.</p> <p><b>80</b> Demonstrates a very good understanding of the requirements and broad goals and objectives. Clear and very good philosophy and vision. Very good approach to engagement and achieving consensus.</p> <p><b>60</b> Demonstrates a reasonable understanding of the requirements and broad goals and objectives. Reasonably good philosophy and vision. Reasonable approach to engagement and achieving consensus.</p> <p><b>40</b> Lacks adequate understanding of the requirements in some areas. Weak philosophy and vision, information lacking in many areas, some generic information provided.</p> <p><b>20</b> Lacks complete or almost complete understanding of the Requirement. Significant lack of information.</p> <p><b>0</b> Information is insufficient to properly address</p>



## SUBMISSION REQUIREMENTS AND EVALUATION

### 352 RT3 Understanding of the Project relative to Stream 3

The Proponent should demonstrate an understanding of the goals of the Project, the functional/technical requirements, the objectives, constraints and issues that will affect the Planning and Pre-Procurement/ AFP Procurement/Design & Construction , Implementation as well as the Post-Construction, Operation and Maintenance Phases for assets delivered under an AFP procurement method. For the purposes of this criteria, the Block 2 Redevelopment project described in the Project Description section of the Project Brief should be used.

It is recommended to submit the information using a maximum of five (5) pages.

The information sought and scoring method shall be as follows:

RT3	UNDERSTANDING OF THE PROJECT Stream 3 Services	Rating Score
A demonstration that the Proponent understands the overall requirements for the services described in the RFP related to Stream 3, specifically related to Advocate Architect services.	<p>This criterion assesses the degree to which the proposal identifies and substantiates in detail the underlying understanding of the functional and technical requirements specific to the proposed Block 2 Redevelopment under an AFP form of delivery.</p> <p><i>What the Proponent should provide:</i></p> <ul style="list-style-type: none"> <li>a) An interpretation of the Project Scope's functional and technical requirements including the interrelation of complimentary and/or co-dependent project requirements, including the services provided under Stream 1.</li> <li>b) A critical assessment of broader goals as they relate to sustainable development, functional program and site sensitivities, and how they can be clearly achieved under an AFP delivery.</li> <li>c) Demonstrate an understanding of Project Scope's, and significant issues, challenges and constraints specific to the AFP delivery approach.</li> <li>d) Demonstrate an understanding of how the Required Services – Stream 3 will be implemented within the Project Scope and provide a strategy for the delivery of services for each Phase (Pre-Procurement, AFP Procurement, Design/ Post Construction)</li> <li>e) Demonstrate an understanding of the cost and schedule responsibilities of Advocate Architect within the project's scope, schedule and cost as a whole, and provide a high-level risk management strategy for both schedule and costs.</li> <li>f) Demonstrate an understanding of the Project's various participants and stakeholders.</li> </ul>	<p><b>Maximum 100 points</b></p> <p><b>100</b> Demonstrates an excellent understanding of the requirements and broad goals and objectives. Very clearly addresses all of the elements outlined</p> <p><b>80</b> Demonstrates a very good understanding of the requirements and broad goals and objectives. Addresses all of the elements outlined, minor lack of information.</p> <p><b>60</b> Demonstrates a reasonable understanding of the requirements and broad goals and objectives. Most of the elements have been addressed but lacks information or specifics</p> <p><b>40</b> Lacks adequate understanding of the requirements in some areas. Many elements not adequately addressed or reliance on generic description non-project specific.</p> <p><b>20</b> Lacks complete or almost complete understanding of the Requirement. Significant lack of information.</p> <p><b>0</b> Information is insufficient to properly address</p>

---

## **SUBMISSION REQUIREMENTS AND EVALUATION**

---

### **3.6 RATED TECHNICAL REQUIREMENTS (RT) –MANAGEMENT OF SERVICES**

This section will assess the management skills of the Proponent in the context of delivering services in a multi-disciplinary environment, over the full duration of the assignment. More specifically this criteria will also serve to assess how the Proponent intends to deliver the Required Services across the various Steams (Steam 1, Stream 2 and Stream 3).

#### **3.6.1 RT4 Team Composition, Organization Structure and Capacity**

This criterion will assess the Proponent's proposed team composition, organizational structure (Including roles, responsibilities and accountabilities within the Proponent's Team) , capacity and resourcing approach to deliver the various services specified;

#### **3.6.2 RT5 Project Management (PM) Approach and Methodology**

This criterion will assess the overall Project Management approach and methodology to support the timely delivery of all services under the various Streams of services;

#### **3.6.3 RT6 Work Plan and Scheduling**

This criterion will assess the ability of the Proponent to translate the information and requirements provided in the Project Brief and structure from it a clear Work Plan and Project Schedule demonstrating level of effort per assigned personnel and identifying major milestones and deliverables. The Work Plan is to describe the approach to issue resolution during the course of the contract. For the basis of evaluation, this criteria will be assessed based on the information provided in the Project Brief, Required Services – Stream 1.

It is recommended to submit the information using a maximum of five (5) pages.

The information sought and scoring method shall be as per the tables RT4, RT5 and RT6 as follows:

## SUBMISSION REQUIREMENTS AND EVALUATION

RT4	MANAGEMENT OF SERVICES Team Composition, Organizational Structure and Capacity	Rating Score
<p>A demonstration of the Proponents entire team structure, it's organization and a demonstration that the Proponent has the capacity to deliver the services required or requested .</p>	<p><i>What the Proponent should provide:</i></p> <ul style="list-style-type: none"> <li>a) An interpretation of the Project Scope's functional and technical requirements including the interrelation of complimentary and/or co-dependent project requirements, including the planning parameters developed under Stream 1.</li> <li>b) Full, complete and synthesized management and organizational structure that identifies the reporting relationships between the various Proponent Team members. The organizational structure should be developed to describe the underlying structure applicable to all 3 Streams of services, as well as the management of the overall services and interface with the Departmental Representative.</li> <li>c) Roles and responsibility of the entire Proponent Team members, with hierarchical relationships, including identification of Key Discipline Individuals and back-up strategy.</li> <li>d) The assignment of resources internal to the Proponent's Team to meet the requirements under Stream 1 and 3, as well as the capacity to respond adequately to Task Authorizations under Stream 2 as they arise.</li> <li>e) Capacity, ability and method to effectively respond to a surge of business volume (multiple concurrent Task Authorizations)</li> </ul>	<p><b>Maximum 100 points</b></p> <p><b>100</b> Demonstrates an excellent and effective organizational structure, tailored and more than capable to meet the requirements. Very clearly addresses all of the elements outlined.</p> <p><b>80</b> Demonstrates a very good organizational structure, tailored and should be well capable to meet the requirements. Addresses all of the elements outlined. Minor gaps.</p> <p><b>60</b> Demonstrates a reasonably good organizational structure that should be reasonably capable to meet the requirements. Addresses most but not all of the elements outlined. Noticeable gaps</p> <p><b>40</b> Lacks adequate understanding of the requirements in some areas. Many elements not adequately addressed or reliance on generic description non-project specific.</p> <p><b>20</b> Lacks complete or almost complete understanding of the Requirement. Significant lack of information.</p> <p><b>0</b> Information is insufficient to properly address</p>

## SUBMISSION REQUIREMENTS AND EVALUATION

RT5	MANAGEMENT OF SERVICES Project Management Approach and Work Methodology	Rating Score
<p>A demonstration of the Proponents Project Management approach and capability to ensure services are delivered according to established timeframes and quality standards, and are supported by a risk management framework.</p>	<p><i>What the Proponent should provide:</i></p> <ul style="list-style-type: none"> <li>a) An interface approach between the Departmental Representative and other major project stakeholders</li> <li>b) Management authority and techniques to ensure Contract Management effectiveness and responsiveness across all Streams or work, for the duration of the contract.</li> <li>c) Risk management strategy and techniques</li> <li>d) Quality control techniques related to the deliverables, individual Streams of services and the overall standards of performance of the work.</li> <li>e) A conflict resolution strategy and escalation mechanism</li> </ul>	<p><b>Maximum 100 points</b></p> <p><b>100</b> Demonstrates an excellent and effective PM capacity, more than capable to meet the requirements. Very clearly addresses all of the elements outlined.</p> <p><b>80</b> Demonstrates a very good PM capacity capable to meet the requirements. Addresses all of the elements outlined. Minor gaps.</p> <p><b>60</b> Demonstrates a reasonably good PM capacity, reasonably capable to meet the requirements. Addresses most but not all of the elements outlined. Noticeable gaps</p> <p><b>40</b> Lacks adequate understanding of the requirements in some areas. Many elements not adequately addressed or reliance on generic description non-project specific.</p> <p><b>20</b> Lacks complete or almost complete understanding of the Requirement. Significant lack of information.</p> <p><b>0</b> Information is insufficient to properly address</p>

## SUBMISSION REQUIREMENTS AND EVALUATION

RT6	MANAGEMENT OF SERVICES Work Plan and Scheduling	Rating Score
<p>A demonstration of the Proponents ability to interpret the requirements expressed in the Project Brief – Required Services Stream 1, and structure the required services into a Work Plan and project schedule.</p>	<p><i>What the Proponent should provide:</i></p> <ul style="list-style-type: none"> <li>a) Based on the information provided in the Project Brief, Required Services - Stream 1, provide a Work Breakdown Structure (WBS) and outline Work Plan that will include a breakdown of major work tasks and deliverables.</li> <li>b) Provide an overall Schedule for the services identified under Stream 1, co-related to the work plan</li> <li>c) Tools, techniques and approach utilized to manage the schedule of the services, including work issued under Task Authorization.</li> </ul>	<p><b>Maximum 100 points</b></p> <p><b>100</b> Very clear Work Plan and Schedule. Both are coordinated. Strong understanding of schedule management.</p> <p><b>80</b> Clear Work Plan and Schedule. Both are coordinated. Good understanding of schedule management. Minor gaps.</p> <p><b>60</b> Somewhat clear Work Plan and Schedule. Reasonable understanding of schedule management. Minor gaps.</p> <p><b>40</b> Lacks adequate understanding of the requirements in some areas. Many elements not adequately addressed or reliance on generic description non-project specific.</p> <p><b>20</b> Lacks complete or almost complete understanding of the Requirement. Significant lack of information.</p> <p><b>0</b> Information is insufficient to properly address</p>

## SUBMISSION REQUIREMENTS AND EVALUATION

### SRE 4.0: EVALUATION AND RATING

#### 4.1 Technical Rating

Proposals that are responsive (i.e. which meet all the mandatory requirements set out in the RFP) 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:

#### Technical Rating

Criteria	Weight Factor	Max Raw Score (MRS)	Max Weighted Score (WS)
<b>EXPERIENCE OF THE PROPONENT</b>			
3.2.1 RP1 - Achievements of Proponent - Stream 1	3.0	150	450
3.2.2 RP2 - Achievements of Proponent - Stream 2	3.0	150	450
3.2.3 RP3 - Achievements of Proponent - Stream 3	3.0	150	450
<b>EXPERIENCE KEY SUB-CONSULTANTS / SPECIALISTS</b>			
3.3.1 RP4 Achievements of Key Sub-consultants and/or Specialists Stream 1	1.5	150	225
3.3.2 RP5 Achievements of Key Sub-consultants and/or Specialists Stream 2 and 3	2.0	150	300
<b>EXPERIENCE OF KEY DISCIPLINE INDIVIDUALS</b>			
3.3.3 RT1 Experience of Key Discipline Individuals on Past Projects	3.0	130	390
<b>UNDERSTANDING OF THE PROJECT</b>			
3.3.4 RT2 Understanding of the Project - Stream 1	1.5	100	150
3.3.5 RT3 Understanding of the Project - Stream 3	1.5	100	150
<b>MANAGEMENT OF SERVICES</b>			
3.4.1 RT4 Team Composition/Org Structure/Capacity	1.0	100	100
3.4.2 RT5 PM Approach and Methodology	1.0	100	100
3.4.3 RT6 Work Plan and Scheduling	1.0	100	100
TOTAL POINTS			<b>2865</b>
<b>TECHNICAL RATING (TR) = TOTAL POINTS DIVIDED BY 44.07692</b>			<b>65</b>

#### 4.2 Proponent Presentation (PP1)

This project will require significant consultation with several levels of stakeholders and public and necessitates the ability to lead workshops with clarity, control, enthusiasm, and respect while building consensus. The Proponent team will also be required to

---

## **SUBMISSION REQUIREMENTS AND EVALUATION**

---

make several presentations to various approval agencies, including the NCC, throughout the duration of the project.

The intent of the presentation required herein is to evaluate the Proponent's ability to effectively present their philosophy, approach and methodology for consultation and consensus building with a varied group of stakeholders. The Proponent's presentation will therefore solely focus on the approach to engagement and the content limited to the draft Public Engagement Plan for Stream 1.

It is required that the presenters be personnel that will form part of the Stream 1 Consultant team and include individuals who will present/lead during the development and implementation of the project. The proponent team will be required to make a thirty (30) minute presentation, followed by a brief question and answer period with the PWGSC evaluation board. Proponents must be available to make the presentation within two (2) weeks of being contacted by PWGSC. A maximum of four (4) representatives per Proponent will be allowed. The proponent team can make use of audio/visual material as they wish. Presentations should preferably be made in person, however, arrangements can be made to present via videoconferencing if necessary.

The presentation will be scored on consistency with the written proposal, and the communication and presentation skills of the individuals on the Proponent team. New information not provided in the Proponent's response to the RFP will not be permitted and will result in fewer points. Interviews will last 45 minutes as follows:

- Introductions 5 minutes
- Presentation by Consultant – 30 minutes
- Questions and Answers – 10 minutes

The information sought and scoring method shall be as follows:

## SUBMISSION REQUIREMENTS AND EVALUATION

PP1	Evaluation of Proponent's Presentation	Presentation Rating
The purpose of the presentation is to evaluate the Proponent's public speaking and presentation skills.	<p><i>The Proponent's Presentation will be evaluated on:</i></p> <ul style="list-style-type: none"> <li>a) Presentation Structure: The presentation should be easy to follow based on a clear and logical structure. Visuals and images should emphasize and illustrate key points and slides should be easy to read containing no unnecessary information. Information presented must be consistent with written proposal.</li> <li>b) Method of Delivery: The presentation should engage the audience from start to finish. It should be clear that the Presenter built the slide structure based on a strong presentation outline and sufficiently rehearsed the presentation.</li> <li>c) Style of Delivery: The presenter should use body language and voice clarity to emphasize key points and animate the presentation.</li> </ul>	<p><b>Maximum 10 points</b></p> <p><b>10</b> Presentation was excellent with a clear logical organization and structure, using high-quality visuals and images of clear relevance. Information presented was consistent with the proposal. The Presenter was engaging throughout the presentation, spoke confidently and clearly and made eye contact to connect with the audience. The Presenter did not read from the slide.</p> <p><b>8</b> Presentation was very good, well organized with good structure making it easy to follow. Information presented was consistent with proposal. The Presenter was mostly engaging throughout the presentation, spoke clearly and made eye contact connecting with the audience.</p> <p><b>6</b> Presentation was acceptable but would benefit from a better organization or structure and visuals and images sometimes lacked relevance to the presentation. Some effort was required to link the presentation with the proposal. The Presenter did not engage or use body language <u>consistently</u> throughout the presentation to connect with the audience.</p> <p><b>4</b> The Presentation was less than adequate. The presentation had a weak structure and visuals lacked relevance to presentation. Effort was required to link the presentation with the proposal. The Presenter was limited in their engagement or use of body language and had difficulty maintaining a connection with the audience.</p> <p><b>2</b> Presentation was difficult to follow and lacked a coherent organization and structure. The presentation contained limited visuals/images with limited relevance to the topic and new information was presented that was not part of the written proposal. The Presenter lacked confidence in delivery and made no eye contact or connection with the audience.</p> <p><b>0</b> Presentation had no clear structure or organization and could not be followed. The presentation did not contain any visuals or images and new information was presented that was not part of the written proposal. The Presenter read the slides and delivery came across as unrehearsed.</p>



## SUBMISSION REQUIREMENTS AND EVALUATION

--	--	--

### SRE 5: ABORIGINAL PARTICIPATION PLAN

To meet the Government of Canada's objectives of encouraging Aboriginal socio-economic development through federally funded opportunities, bidders are strongly encouraged to submit a draft Aboriginal Participation Plan (APP) as part of their RFP response.

Over the term of the contract, the APP is intended to develop long-term capacity and sustainable and meaningful socio-economic benefits for Aboriginal professionals and businesses in the fields of architecture and engineering as well as the various specialized professions covered under this project.

The APP covers direct and non-direct benefits. For this RFP, direct benefits refers to Aboriginal employment, including opportunities as the Prime Proponent, one of its Sub-Consultants, or employees and/or personnel within the Proponents team members. Non-direct benefits refer to measures where there is a lack of Aboriginal business capacity which can be developed by specialized training, internships and/or apprenticeships among others.

#### Aboriginal Business Capacity

To identify Aboriginal business capacity, for contracting or subcontracting purposes, you can review the list of Aboriginal businesses registered in the Aboriginal Business Directory (ABD). A link to the database has been provided below:

[http://www.ic.gc.ca/eic/site/ccc\\_bt-rec\\_ec.nsf/eng/h\\_00011.html](http://www.ic.gc.ca/eic/site/ccc_bt-rec_ec.nsf/eng/h_00011.html)

In addition to the ABD, other directories are available for Aboriginal Businesses including:

- Canadian Council for Aboriginal Business [www.ccab.com](http://www.ccab.com)
- Province of Ontario Aboriginal Directory  
<https://www.lrcsde.lrc.gov.on.ca/aboriginalbusinessdirectory/>

#### Aboriginal Business definition:

For the purpose of this APP, an Aboriginal business can be:

- a band as defined by the Indian Act
- a sole proprietorship
- a limited company
- a co-operative
- a partnership
- a not-for-profit organization in which Aboriginal persons have at least 51 percent ownership and control
- A joint venture consisting of two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business(es), provided that the Aboriginal business(es) has at least 51 percent ownership and control of the joint venture. When an Aboriginal business has six or more full-time employees at the date of submitting

## SUBMISSION REQUIREMENTS AND EVALUATION

the bid, at least thirty-three percent of them must be Aboriginal persons, and this ratio must be maintained throughout the duration of the contract. The bidder must certify in its submitted bid that it is an Aboriginal business or a joint venture constituted as described above.

### Aboriginal Person definition:

An Aboriginal person is an Indian, Metis or Inuit who is ordinarily resident in Canada.

Evidence of being an Aboriginal person will consist of such proof as:

- Indian registration in Canada
- Membership in an affiliate of the Metis National Council or the Congress of Aboriginal Peoples, or other recognized Aboriginal organizations in Canada
- acceptance as an Aboriginal person by an established Aboriginal community in Canada
- enrolment or entitlement to be enrolled pursuant to a comprehensive land claim agreement, or membership or entitlement to membership in a group with an accepted comprehensive claim

Please refer to the link below for further information on Eligibility:

<http://www.aadnc-aandc.gc.ca/eng/1100100033060/1100100033061>

### Scoring of Aboriginal Participation Plans

A score of one hundred percent will be awarded for Aboriginal Participation Plans that materially respond to all socio-economic criteria elements included in the attached form. The details of the submitted APP will be negotiated and finalized with the successful bidder post contract award but will be based on the information provided below.

### Scoring methodology:

- When the Proponent fails to include an APP or where a specified response element is missing or is deemed to be materially incomplete, the score awarded will be nil (0).
- When the proponent provides a materially complete APP, the score awarded will be one hundred (100) (Accounting for a maximum of 5% of the overall Technical Score).

Please use the space provided in the form below to complete the APP.

ABORIGINAL PARTICIPATION PLAN (APP)	
<b>1- Human Resources Plan</b>	
The APP shall include a Human Resource Plan that details how the Prime-Consultant and/or its subconsultant(s) intends to maximize the use of Aboriginal	

## SUBMISSION REQUIREMENTS AND EVALUATION

employment within the fields of Architecture, Engineering or other design profession as specified in Annex D.

The Human Resource Plan shall address how the employment of Aboriginal people will be managed.

The Human Resource Plan shall:

- 1- Identify the Aboriginal team members currently within the Proponent Team/their qualifications/their position;
- 2- Provide the strategies to recruit and retain additional Aboriginal persons.

**Proponent Response:**

### 2- Business Plan

The APP shall include a Business Plan that details how the Prime-Consultant and/or its subconsultant(s) intends to maximize the use of Aboriginal firms within the fields of Architecture, Engineering or other design profession as specified in Annex D.

The Business Plan shall:

- 1- Identify the work intended to be carried out by Aboriginal firms, as well as the dollar value of the work,
- 2- Detail how business with Aboriginal firms will be managed and
- 3- Detail on any development of new capabilities.

**Proponent Response:**

### 3- Training and Skills Development Plan

The APP shall include a Training and Development Plan that details how the Prime-Consultant and/or its subconsultant(s) intends to maximize the training and skills development of Aboriginal persons within the fields of Architecture,

## SUBMISSION REQUIREMENTS AND EVALUATION

Engineering or other design profession as specified in Annex D .

The Skills Development Plan shall address the use of :

- 1- Internship,
- 2- On the job training,
- 3- In-house training
- 4- Graduate on-boarding, and
- 5- Other opportunities.

### Proponent Response:

#### 4- Other Measures

The APP shall include other relevant measures that the Prime-Consultant and/or its subconsultant(s) intends to elaborate/implement to maximize the use of Aboriginal employment/firms/persons within the fields of Architecture, Engineering or other design profession as specified in Annex D.

Other relevant measures could be, but not limited to, specialized training, career development, scholarships and community outreach to encourage Aboriginal youth to enter into the architecture, design and engineering professions and help local and Aboriginal communities in meeting their social and economic development needs.

### Proponent Response:

#### Scoring:

Where the Proponent has provided information materially responding to all criteria listed above, the assigned score will be one hundred (100).  
Where any criteria is missing or deemed materially unresponsive, the overall assigned score will be zero (0)

Score: 0 or 100

The Presentation and Aboriginal Participation Plan Rating will be added to the overall

## SUBMISSION REQUIREMENTS AND EVALUATION

TECHNICAL RATING to form the Technical and Presentation Rating out of 80.

To be considered further, proponents **must** achieve a minimum Technical and Presentation Rating of **sixty percent (60%) (48 points out of 80)** as specified above). No further consideration will be given to proponents not achieving the minimal pass mark.

### SRE 6: PRICE OF SERVICES

All price proposal envelopes corresponding to responsive proposals which have achieved the pass mark of forty-eight (48) points for the Technical and Presentation Rating will be opened upon completion of the technical evaluation and the proponent presentation.

Scoring methodology:

- An average price is determined by adding all the price proposals together and dividing the total by the number of price proposals being opened.
- All price proposals which are greater than 25 percent above the average price will cause their respective complete proposals to be set aside and receive no further consideration.

The remaining price proposals are rated on a linear basis from the lowest evaluated price to 25% above the average price, as follows:

$$\text{Price Rating} = 20 - \frac{(\text{the price of the proposal} - \text{the lowest price})}{(\text{25\% above the average price} - \text{the lowest price})} \times 20$$

### SRE 7: EXAMPLE OF PRICE CALCULATION

Table 1 – Hypothetical Proposal Information		
Proposal	Technical and Presentation Rating	Evaluated Price
Proposal A (low price)	64 / 80	\$10,000,000.00
Proposal B	65 / 80	\$10,200,000.00
Proposal C	66 / 80	\$12,500,000.00
Proposal D	67 / 80	\$15,000,000.00

$$\begin{aligned} \text{25\% Above the Average Price} &= (10,000,000 + 10,200,000 + 12,500,000 + 15,000,000) / 4 * 1.25 \\ &= 14,906,250 \end{aligned}$$

Table 2 – Price Evaluation of Hypothetical Proposals		
Firm	Calculation	Price Rating
Proposal A	$20 - \frac{(10M - 10M)}{(14,906,250 - 10M)} * 20$	20
Proposal B	$20 - \frac{(10.2M - 10M)}{(14,906,250 - 10M)} * 20$	19.18

## SUBMISSION REQUIREMENTS AND EVALUATION

	(14,906,250 – 10M)	
Proposal C	$20 - \frac{(12.5M - 10M)}{(14,906,250 - 10M)} * 20$	9.81
Proposal D	Proposal D is over the average + 25% and is set aside	N/A

Table 3 – Total Score Calculation of Hypothetical Proposals			
Firm	Price Rating	Technical and Presentation Rating	Total Score
Proposal A	20	64	84
Proposal B	19.18	65	84.18
Proposal C	9.81	66	75.81
Proposal D	N/A	N/A	N/A

The Hypothetical Proposal of Consultant B is the highest combined Price and Technical Rating of 84.18, and therefore would be recommended for contract award.

### SRE 7: TOTAL SCORE

Total Scores will be established in accordance with the following:

Rating	Score
Technical Rating	0 - 65
Presentation Rating	0 – 10
Aboriginal Participation Plan	0 or 5
Price Rating	0 - 20
<b>Total Score</b>	<b>0 - 100</b>

The Proponent receiving the highest Total Score will be the first entity that the Evaluation Board will recommend be approached in order to finalize the details of a contractual agreement for the provision of the required services. In the case of a tie, the Proponent submitting the lower price for the services will be selected.

### SRE 8: 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

## SUBMISSION REQUIREMENTS AND EVALUATION

---

(GI 15). Proponents may choose to introduce their submissions with a cover letter.

- ☐ Team Identification - see typical format in Appendix A
- ☐ Declaration/ Certification - completed and signed form(s) - form(s) provided in Appendix B
- ☐ Proposal - one (1) signed original plus six (6) copies
- ☐ Integrity Provisions – Required documentation – **as applicable** in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per R1410T (2017-08-17), General instructions 1 (GI1), Integrity Provisions – Proposal, **section 3a.**
- ☐ Integrity Provisions - Declaration of Convicted Offences – **with its bid, as applicable** in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per R1410T (2017-08-17), General instructions 1 (GI1), Integrity Provisions – Proposal, **section 3b.**
- ☐ Front page of RFP
- ☐ Front page(s) of any solicitation amendment
- ☐ Information related to Security Requirement (Appendix F)

**In a separate envelope:**

- ☐ Price Proposal form - one (1) completed and signed

## **PROJECT BRIEF**

### **TABLE OF CONTENTS**

<b>PROJECT DESCRIPTION (PD)</b>	<b>4</b>
<b>PD 1 INTRODUCTION</b>	<b>4</b>
<b>PD 1.1 Project Identification</b>	<b>6</b>
<b>PD 2 CONSULTANT SERVICES</b>	<b>6</b>
<b>PD 3 CONTEXT</b>	<b>8</b>
<b>PD 3.1 Mandate of Parliamentary Precinct Branch</b>	<b>8</b>
<b>PD 3.2 From LTVP to a Campus Master Plan</b>	<b>8</b>
<b>PD 4 DESCRIPTION OF STREAMS</b>	<b>9</b>
<b>PD 4.1 Stream 1 - Campus Master Plan for the Parliamentary Precinct integrated with the adjacent Judicial Precinct and Library and Archives Canada Site (LTVP Update)</b>	<b>9</b>
<b>PD 4.2 Stream 2 – Architectural, Engineering and Specialized Services</b>	<b>19</b>
<b>PD 4.3 Stream 3 – Advocate Architect</b>	<b>25</b>
<b>PROJECT ADMINISTRATION AND GOVERNANCE (PA)</b>	<b>32</b>
<b>PA 1 GENERAL INFORMATION</b>	<b>33</b>
<b>PA 1.1 ROLES AND RESPONSIBILITIES</b>	<b>33</b>
<b>PA 1.2 COORDINATION WITH DEPARTMENTAL REPRESENTATIVE</b>	<b>36</b>
<b>PA 1.3 HEALTH AND SAFETY</b>	<b>37</b>
<b>PA 1.4 PROJECT REVIEW AND RESPONSE TIME REQUIREMENTS</b>	<b>37</b>
<b>PA 1.5 OFFICIAL LANGUAGES</b>	<b>38</b>
<b>PA 2 FUNCTIONAL REQUIREMENTS</b>	<b>39</b>
<b>PA 2.1 DESIGN CODES, REGULATIONS AND REFERENCE DOCUMENTS</b>	<b>39</b>
<b>PA 2.2 PROJECT DELIVERY APPROACH</b>	<b>39</b>
<b>PA 2.3 MEDIA</b>	<b>39</b>
<b>PA 2.4 GENERAL PROJECT DELIVERABLES</b>	<b>40</b>
<b>PA 2.5 ACCEPTANCE OF PROJECT DELIVERABLES</b>	<b>41</b>
<b>PA 2.6 AWARDS</b>	<b>41</b>
<b>PA 3 PROJECT GOVERNANCE</b>	<b>41</b>
<b>PA 3.1 PWGSC GOVERNANCE</b>	<b>41</b>
<b>PA 3.2 PARLIAMENTARY PARTNERS</b>	<b>42</b>
<b>PA 3.3 INDIGENOUS COMMUNITIES</b>	<b>42</b>
<b>PA 3.4 STAKEHOLDERS</b>	<b>42</b>



## **PROJECT BRIEF**

<b>PA 3.5</b>	<b>AUTHORITIES HAVING JURISDICTION .....</b>	<b>43</b>
	<b>REQUIRED SERVICES (RS) .....</b>	<b>46</b>
	<b>STREAM 1 REQUIRED SERVICES .....</b>	<b>46</b>
1.0	<b>CONDITIONS OF WORK .....</b>	<b>46</b>
2.0	<b>PUBLIC ENGAGEMENT PLAN .....</b>	<b>46</b>
<b>RS 1</b>	<b>STAGE ONE: PROJECT AND BACKGROUND REVIEW .....</b>	<b>47</b>
1.1	<b>INTENT .....</b>	<b>47</b>
1.2	<b>SCOPE AND ACTIVITIES/ DELIVERABLES .....</b>	<b>47</b>
<b>RS 2</b>	<b>STAGE TWO: PLANNING SUMMITS AND VISIONING .....</b>	<b>48</b>
2.1	<b>INTENT .....</b>	<b>48</b>
2.2	<b>SCOPE AND ACTIVITIES / DELIVERABLES .....</b>	<b>48</b>
<b>RS 3</b>	<b>STAGE THREE: ANALYSIS OF PROJECT REQUIREMENTS .....</b>	<b>50</b>
3.1	<b>INTENT .....</b>	<b>50</b>
3.2	<b>SCOPE AND ACTIVITIES/ DELIVERABLES .....</b>	<b>50</b>
<b>RS 4</b>	<b>STAGE FOUR: OPTIONS DEVELOPMENT .....</b>	<b>54</b>
4.1	<b>INTENT .....</b>	<b>54</b>
4.2	<b>SCOPE AND ACTIVITIES .....</b>	<b>54</b>
<b>RS 5</b>	<b>STAGE FIVE: DRAFT CAMPUS MASTER PLAN .....</b>	<b>59</b>
5.1	<b>INTENT .....</b>	<b>59</b>
5.2	<b>SCOPE AND ACTIVITIES/ DELIVERABLES .....</b>	<b>59</b>
<b>RS 6</b>	<b>STAGE SIX: FINAL CAMPUS MASTER PLAN .....</b>	<b>60</b>
6.1	<b>INTENT .....</b>	<b>60</b>
6.2	<b>SCOPE AND ACTIVITIES/ DELIVERABLES .....</b>	<b>60</b>
<b>RS 7</b>	<b>OPTION 1, IMPLEMENTATION STRATEGY &amp; COSTING PLAN .....</b>	<b>62</b>
7.1	<b>INTENT .....</b>	<b>62</b>
7.2	<b>SCOPE AND ACTIVITIES/ DELIVERABLES .....</b>	<b>62</b>
<b>RS 8</b>	<b>OPTION 2, SYNOPSIS DOCUMENT .....</b>	<b>64</b>
8.1	<b>INTENT .....</b>	<b>64</b>
8.2	<b>SCOPE AND ACTIVITIES/ DELIVERABLES .....</b>	<b>64</b>
	<b>STREAM 2 REQUIRED SERVICES .....</b>	<b>65</b>
1.0	<b>INTRODUCTION .....</b>	<b>65</b>
2.0	<b>SCOPE OF SERVICES .....</b>	<b>65</b>
<b>RS 2.2</b>	<b>ADDITIONAL SERVICES .....</b>	<b>98</b>

## **PROJECT BRIEF**

---

<b>RS 2.3</b>	<b>SPECIALIZED SERVICES .....</b>	<b>145</b>
<b>STREAM 3 REQUIRED SERVICES .....</b>		<b>171</b>
<b>1.0</b>	<b>INTRODUCTION .....</b>	<b>171</b>
<b>2.0</b>	<b>SCOPE OF SERVICES .....</b>	<b>171</b>
<b>RS 2.1</b>	<b>Phase 1 – Pre-Procurement.....</b>	<b>172</b>
<b>RS 2.2</b>	<b>Phase 2 – AFP Procurement .....</b>	<b>182</b>
<b>RS 2.3</b>	<b>Phase 3 – Design and Construction.....</b>	<b>184</b>
<b>RS 2.4</b>	<b>Phase 4 – Post-Construction Phase .....</b>	<b>187</b>
<b>ANNEXES .....</b>		<b>188</b>
<b>ANNEX A – STRATEGIC DIRECTIONS .....</b>		<b>189</b>
<b>ANNEX B – STUDY AREA FIGURE .....</b>		<b>189</b>
<b>ANNEX C – LIST OF AVAILABLE DOCUMENTATION.....</b>		<b>191</b>
<b>ANNEX D – CATEGORY OF PERSONNEL DEFINITIONS .....</b>		<b>196</b>

## **PROJECT BRIEF**

---

This Project Brief is divided into three sections:

- Project Description (PD)
- Project Administration and Governance (PA)
- Required Services (RS)

## **PROJECT DESCRIPTION (PD)**

### **PD 1 INTRODUCTION**

The Parliamentary Precinct Branch (PPB) of the Department of Public Works and Government Services Canada (PWGSC) requires the Consultant to provide a broad range of architectural, engineering, urban planning/design and other specialized services to deliver future planning, pre-project and preliminary project development initiatives to achieve a coordinated, digitally enabled and integrated approach to design and development of the Parliamentary Precinct Campus.

Activities will be grouped into three streams:

**Stream 1: Planning Framework** – Under this stream, the Consultant will develop a Campus Master Plan (LTVP Update) and Campus Information Model for the Parliamentary Precinct integrated with the adjacent Judicial Precinct and Library and Archives Canada Site which will establish parameters for future growth and development in the Parliamentary Precinct.

**Stream 2: Architectural, Engineering and Specialized Services** – Under this stream the Consultant will provide, as and when required, a broad range of general architectural, engineering and other specialized services over a period of up to 15 years to support the continued implementation of the Long Term Vision and Plan (LTVP), and as updated by the Campus Master Plan in Stream 1. This requirement includes supporting planning/pre-project technical studies to further define, refine and develop specific projects captured under the Campus Master Plan vision and direction established under Stream 1, as well as to provide pre-design, design, and/or construction oversight services for selected projects identified in the existing LTVP and as updated by the Campus Master Plan. Although the intent of this stream is largely focused on the provision of planning/pre-project studies (i.e. pre-design services), the Consultant may also be requested via Task Authorization to provide full design and/or construction oversight services for capital construction projects not to exceed \$20 million in construction cost.

**Stream 3: Advocate Architect Services** – Under this stream the Consultant will provide, as and when required, architectural and engineering oversight support services for select projects delivered using a Design-Build or Alternative Form of Procurement (AFP). The role of the

## **PROJECT BRIEF**

---

Advocate Architect is to ensure that the design-build team or AFP team, adheres to a high standard of design and construction quality, and conforms to performance specifications and design guidelines established for the project.

The streams are described in more detail in Section PD 4 Description of Streams.

The method of supply selected is a contract with Task Authorizations. The basis of payment for Stream 1 Services consists of fixed fees given that services under this stream are contained in a defined scope of services and delivered over a relatively limited timeframe. Streams 2 and 3 will be delivered on the basis of individual Task Authorizations with the selection of the basis of payment for each Task Authorization dependent on the scope and nature of the individual assignments.

## **PROJECT BRIEF**

---

### **PD 1.1 Project Identification**

**Location of the Project:** Ottawa, Ontario

**PWGSC Project Number:** R.086209.001

**Client/Owner:** Public Works and Government Services Canada (PWGSC)

**Client Representative:** Parliamentary Precinct Branch, Campus Integration,  
Program, Portfolio and Client Relationship Management

### **PD 2 CONSULTANT SERVICES**

The Consultant must provide comprehensive professional services for all aspects of the project, either with in-house expertise or through specialists, or a combination of both. The proposed team must be recognized as thought-leaders at the forefront of their respective professions, capable of bringing foresight, innovation, research, in-depth knowledge of best practices and lessons learned from past projects.

The services required from the Consultant and his sub-consultants/specialists, will be broad ranging and include the full range of Architecture and Engineering services as described by the RAIC (Royal Architectural Institute of Canada) as basic or “traditional services”, expanded to also include specialized services required to advance the objective of the mandate (refer to appendix E and F of the RAIC’s Guide to Determine the appropriate fees for the services of an Architect <https://www.raic.org/node/24688>).

It is expected that all services required from the Consultant be articulated through a combination of deliverables, information systems and workflows, ensuring that ongoing evolution and usability of the Campus Information Model after project completion, and the best value for the crown. This may be achieved through the use of GIS and BIM technologies, analysis applications, database linkages or collaborative platforms, amongst others.

For guidance, the following is a non-exhaustive list of professional services which may be expected to be required over the course of the mandate:

Urban Planning and Design	Architecture	Advocate Architect	Campus Planning
---------------------------	--------------	--------------------	-----------------

## **PROJECT BRIEF**

Master Planning	Heritage Architecture / Planning / Conservation	Landscape Architecture	Civil / Municipal / Transportation Engineering
Industrial Engineering/Material Handling Logistics	Fire Code and Fire/Life Safety Engineering	Building Code Analysis	Interior Design
Structural Engineering	Blast Engineering	Seismic and Base Isolation	Mechanical Engineering
Electrical Engineering	Geotechnical Engineering	Environmental Engineering	Security (for buildings and campus environment)
Sustainability	Natural Ecological System	Green Technologies	Intelligent/Smart Building Technologies
Climate Change Vulnerability and Risk Assessment	Building Science	Building Envelope	Roofing
Functional Programming	Universal Accessibility	Commissioning	Food Service / Kitchen Design
Wayfinding and Signage	Building Information Modelling (BIM)	Vertical Transportation	Shadow / Wind Studies
Lighting	Hardware Design	Acoustics	Move Coordination
Energy Management and Control Systems	Indoor Air Quality	Structured Cabling Design	Crime Prevention through Environmental Design (CPTED)
IT/Telecommunications	Information Management/Information Technology (IM/IT)	Material and Methods Research	Cultural Anthropology
Public Consultation and Facilitation	Promotion and Public Relations	Presentation Material (various media)	Documentation Services
Indigenous Consultation/Engagement	Translation Services	Interactive and Immersive Multi-Media Design (including 3D modelling and renderings)	Copy/Technical Writing
Public-Private Partnerships (P3)	Facility Management	Stakeholder Engagement	Project Management
Quality Control	Risk Management	Scheduling	Cost Estimating

If the Consultant believes that the project requires, or would benefit from additional expertise not listed, they should identify this additional expertise and role in the project in the response to this RFP.

## **PROJECT BRIEF**

---

### **PD 3 CONTEXT**

#### **PD 3.1 Mandate of Parliamentary Precinct Branch**

The Parliamentary Precinct Branch (PPB) oversees the day-to-day operations, care and stewardship of the buildings and grounds in the Parliamentary Precinct and provides the accommodations and infrastructure necessary for a modern parliament to serve Canadians. In total, PPB is responsible for 34 crown-owned buildings and associated lands, of which 28 are designated heritage properties.

PPB carries out its mandate in a complex multi-jurisdictional environment and by working directly and in close collaboration with the Parliamentary Partners: Senate of Canada, the House of Commons, the Library of Parliament, the Parliamentary Protective Service and the Privy Council Office. Other government departments, organizations and the municipalities of Ottawa and Gatineau are key stakeholders. The National Capital Commission is the Design and Federal Land Use approval authority for works undertaken on designated federally owned lands within the geographic areas of mandate.

The current plan for the Precincts, the “Parliamentary and Judicial Precincts Area Site Capacity and Long Term Development Plan”, commonly referred to as the LTVP, was approved by the National Capital Commission’s (NCC) Board of Directors in 2006. It built upon, and replaced, both the 1987 *Parliamentary Precinct Area Design Guidelines and Demonstration Plan for Long Range Development* (the 1987 Plan) and the 2001 *Parliamentary Precinct Long Term Vision and Planning Framework – Urban Design Study* (the 2001 Plan) previously approved by the NCC.

The LTVP has taken a long-term view on restoring the Precinct’s heritage buildings and landscapes, meeting evolving and growing parliamentary accommodation requirements, and providing a secure and welcoming environment for parliamentarians, staff and visitors. It is the backbone of a complex planning and construction program with an overarching vision and direction for the Parliamentary and Judicial Precincts. It provides cohesive direction for multiple, integrated and overlapping projects of various scales and timeframes while recognizing that change within the Precincts needs to occur in a way that balances the evolving functional needs of parliamentarians and other users, with the overriding commitment to preserve the historic, environmental and symbolic primacy of the site.

#### **PD 3.2 From LTVP to a Campus Master Plan**

Since the 2006 update, the approach to how the Precinct should evolve has changed significantly. In practical terms, the deliverable from Stream 1 of this contract, the Campus Master Plan, signals a shift away from the LTVP’s building-by-building approach which has been instrumental in facilitating the Centre Block rehabilitation project, towards an integrated campus approach. The Campus Master Plan will set out the path to campus integration within the Precinct as well as guide and inform the physical growth of the Precincts moving forward. The evolution to a Campus will be fully realized over the timeframe of the Plan.

## **PROJECT BRIEF**

---

As a strategy to support the strategic directions within the Parliamentary Precinct and realize a 'Smart Campus' approach for the LTVP Update, the Branch has begun to consider the digitalization of its operations, portfolio and services as a catalyst for value-producing opportunities, a methodology to support Client and Public communications, and a resource that can be leveraged into the future. As such, the LTVP Update should be centralized in a Campus Model wherein information, findings and conclusions are later usable for ongoing evolution within the Branch.

### **PD 4 DESCRIPTION OF STREAMS**

#### **PD 4.1 Stream 1 - Campus Master Plan for the Parliamentary Precinct integrated with the adjacent Judicial Precinct and Library and Archives Canada Site (LTVP Update)**

The Parliamentary Precinct Branch requires a broad range of services to develop a Campus Master Plan for the Parliamentary Precinct integrated with the adjacent Judicial Precinct and Library and Archives site. The Campus Master Plan will be a new document that will build on and replace the 2006 "Parliamentary and Judicial Precincts Area Site Capacity and Long Term Development Plan". It will be an innovative, dynamic, visionary and flexible long-term planning framework to guide decision making about future growth, development, rehabilitation and infrastructure for an integrated Parliamentary Campus. Supporting documents to the Campus Master Plan include the Implementation Strategy and Cost Estimates (Option 1), and a high-level synopsis document (Option 2) to provide an overview of the key elements of Campus Master Plan. The bulk of services will be carried out under the base contract. Options 1 and 2, although important, may be exercised at PWGSC's discretion as detailed in the Agreement Particulars.

##### **PD 4.1.1 Stream 1 Context**

#### **Why is an Update to the LTVP needed?**

##### **Regular Review**

As it has been 10 years since the last update, it is appropriate that the vision, guiding principles and planning and design principles of the Plan be reviewed and updated to ensure that they remain relevant and reflect the current goals and objectives of the Government of Canada.

##### **The Evolving Urban Context**

The urban context has evolved considerably since the last LTVP Update in 2006. Several rehabilitation projects have been completed within the Parliamentary Precinct, and a new focus is being placed on the upcoming redevelopment potential of Blocks 1, 2 and 3. Other contextual factors including security, accessibility, sustainability and climate change are also impacting the operations of the Parliamentary Precinct.



## **PROJECT BRIEF**

---

The attack that took place on Parliament Hill in October 2014 resulted in the creation of the Parliamentary Protective Service (PPS). The PPS is a united security service responsible for physical security throughout the Parliamentary Precinct and the grounds of Parliament Hill. With the continued rise of security incidents around the world, the pressure to effectively prevent and mitigate those concerns has intensified and remains a top priority. Options for a secured Parliamentary Precinct include the introduction of physical interventions, re-thinking circulation and movement and re-imagining Wellington Street among others. Although predicated on a real need, the issue of security is to be viewed as an opportunity rather than constraint recognizing that if executed correctly; it can make a positive and transformative contribution to the public realm.

The Parliamentary Precinct is embarking on an exciting and historic time. With the Prime Minister's announcement of a new use for 100 Wellington Street site as a space for Indigenous Peoples and the redevelopment of Blocks 1, 2 and 3 for long-term Parliamentary accommodations, the next 15 years will see an unprecedented level of development occurring in the Precinct. To date, the LTVP has largely concentrated on the rehabilitation of existing heritage assets (West Block, 180 Wellington, 140 Wellington SJAM, Valour building, GCC, Centre Block), the potential of the next phase lies in the development and construction of new facilities and buildings interwoven and connected to the remainder of the campus. The timing presents a real opportunity for the Campus Master Plan to give positive and meaningful direction to new development while bringing a renewed focus to the life between the buildings and creating a quality public realm with better integration with the municipally-owned Sparks Street.

Outside of the Parliamentary Precinct, the City of Ottawa continues to make significant changes in the downtown, from the introduction of bike lanes along major streets like Laurier Avenue and O'Connor Street to the conversion of its transit system. This year (2018), the City of Ottawa is expected to deliver the first leg of the Confederation Line Light Rail Transit corridor travelling from Tunney's Pasture and Blair Station. The single-biggest infrastructure investment in the City's history, it is expected to change the way that people travel to and from the downtown and across the City. As the downtown portion of the LRT is located underground, it frees up several existing downtown streets from congested bus traffic, allowing the City to redesign and make public realm improvements on these streets.

The LRT will have an impact within the Parliamentary Precinct as well. Currently, a significant number of OC Transpo and Société de transport de l'Outaouais buses travel and stop directly in front of Parliament Hill along Wellington Street. With the opening of the Confederation Line in 2018, there is an opportunity to optimize and re-route buses away from Wellington Street. This presents a significant consideration for the Precinct that will be explored as part of the Campus Master Plan.

On a much broader scale, the Parliamentary Precinct is not immune to the impacts of climate change and extreme weather. Last year excessive rainfall caused an overwhelming rise in the water levels of the Ottawa River, flooding a segment of the pathway behind Parliament Hill.

## **PROJECT BRIEF**

---

While in this instance the damage was isolated and limited to a small part of the Precinct, it is anticipated that extreme weather events will increase in both frequency and intensity. Given this reality, climate change adaptation strategies and infrastructure resiliency are key considerations in the next Update.

Other meaningful initiatives and events may arise before or during the award of the contract. The Consultant must remain connected and aware of other potential initiatives and ensure that any implications are fully considered as part of the Campus Master Plan work.

### **New Strategic Directions** (Refer to Annex A for the complete Strategic Directions Document)

The Campus Master Plan (LTVP Update) is Phase 2 of the overall work plan. Phase 1 was endorsed by Cabinet in May 2017 in the form of five strategic directions intended to guide and inform the development of the next LTVP Update, the Campus Master Plan. These five strategic directions will form the framework and will be realized primarily through collaborative work with the PWGSC project team, the Consultant, the Parliamentary Partners, and stakeholder working groups.

#### **1. Evolve to a Campus Approach for a Modern Parliament**

To facilitate a more comprehensive and integrated approach for precinct functions, all buildings and lands north of Wellington Street, as well as the three blocks south of Wellington (between Elgin Street, Bank Street and north of Sparks Street) will be considered as a single, inclusive campus. This will facilitate more effective planning and development of accommodations, infrastructure, security, and innovation. The shift toward a campus approach will impact the symbolic and operational aspects of the Precinct in a fundamental way, and will be addressed directly in the Campus Master Plan.

#### **2. Leadership in Environmental Sustainability**

The Campus Master Plan will incorporate a comprehensive campus-wide sustainability strategy in support of Government programs and commitments to combat and adapt to climate change. The sustainability strategy will explore opportunities for the campus to reduce Parliament's ecological footprint through initiatives such as the use of clean energy sources, protection and enhancement of natural areas, implementing more efficient and sustainable water and waste management, reviewing space standards and identifying transportation demand strategies among others.

#### **3. Enrich the Visitor Experience**

The Campus Master Plan will identify and incorporate new standards, guidelines and best practices regarding visitor experience to contribute to a world class capital city and provide a memorable visitor experience. This will include identifying designated universally accessible routes for the grounds to ensure access to all key destinations. It will also require exploring opportunities for greater integration between Parliament Hill

## **PROJECT BRIEF**

---

and surrounding areas, contributing to the revitalization of Sparks Street, and re-imagining the function and design of Wellington Street to improve its aesthetic appeal, public realm and walkability.

### **4. Responsible Stewardship**

Looking to the future, the continued good stewardship of this most important place remains paramount. The Campus Master Plan will identify ways to modernize the Parliamentary Precinct while maximizing Canadians' investment in preserving our cultural heritage and protecting the dignity of Parliament.

### **5. Engaging Canadians**

The future of Parliamentary Precinct, the heart of our country's democracy, must be envisioned with the hopes of all Canadians in mind. In support of the Government of Canada's commitment to an open, transparent government, the Campus Master Plan will develop an engagement strategy to support the development of the project to ensure that the Precinct continues to be a welcoming and meaningful place that reflects the values and aspirations of all Canadians.

Planning to address new issues and challenges and/or modifications to the form and fabric of the Parliamentary Precinct is a complex process involving input from various stakeholders, jurisdictions, approval agencies and Parliamentarians. Consultations and workshops with Partners and stakeholders will be a major component in developing the direction, consensus and governance of this project. Therefore, the Consultant must engage Partners and stakeholders in meaningful and collaborative ways, build consensus, and communicate, analyze, develop and refine the Campus Master Plan and Campus Information Model.

### **Transitioning into the Digital and 'Smart' Age**

The digitalization of the Construction Sector and the emergence of Smart Cities and Intelligent Buildings has seen the definition of sound stewardship change within the public built environment. With the emergence of the digital technologies, interaction with space has changed. Virtual tourism, access to information, public engagement, and even building performance and automation is expected at the push of a button for governments around the world.

As BIM and GIS deliverables were not included as part of the 2006 LTVP Update, and both have become indispensable technologies for the management of Real Property, it is intended for this update to the LTVP to be captured and centralized in a digitally interactive and usable way using a hybrid solution of the two in the creation of a Campus Information Model.

The two primary goals of the Campus Information Model is first to support the LTVP Update as a collaboration and information sharing tool during the project, and second to serve as an asset management tool and information repository for the Parliamentary Partners once the project is

## **PROJECT BRIEF**

---

complete.

### **PD 4.1.2 Stream 1 Consultant Services**

The Consultant must assemble the consulting team that they feel will best be able to successfully address all the components of this project. The team must have, at a minimum, professional competencies in the following areas:

- Urban Planning and Design
- Architecture
- Master Planning
- Campus Planning
- Project Management
- Security (for buildings and campus environments)
- Sustainability
- Public Consultation and Facilitation
- Copy /Technical Writing
- Landscape Architecture
- Heritage Architecture/Planning/Conservation
- Universal Accessibility
- Indigenous Engagement
- Translation Services
- Civil Engineering
- Industrial Engineering
- Material Handling
- Natural Ecological System
- Geotechnical Engineering
- Transportation Engineering
- Environmental Engineering
- Scheduling
- Quantity Surveying/Costing
- Immersive and Interactive Multi-Media Design(including 3D modelling and renderings)
- Planning and Design Technologies such as: Building Information Modeling, Virtual Design and Construction, Geographic Information Systems, Virtual Reality and Digital Story-telling

At least one member of the team must be a professional urban planner with a recognized accreditation in the field of urban planning.

Should the Consultant be of the opinion that Stream 1 requires, or would benefit from, additional expertise not listed, they should include all areas of expertise they see fit.

## **PROJECT BRIEF**

### **PD 4.1.3 Stream 1 Goals & Objectives**

The goal is to utilize innovative engagement strategies and complete a comprehensive analysis to deliver a dynamic, visionary and flexible long-term Campus Master Plan and Campus Information Model to guide development in the Precinct for the next 50 years. This will be achieved in a complex administrative and governance context, and will be subject to rigorous scrutiny by government bodies, other stakeholders, the media and the public. As such, the Campus Master Plan will:

- Represent excellence in urban design and planning;
- Represent the values and aspirations of all Canadians;
- Balance multiple and occasionally competing requirements;
- Represent a transparent and collaborative process endorsed by the Parliamentary Partners and stakeholders.

### **PD 4.1.4 Stream 1 Property Context**

#### **Study Area**

For the purposes of this project under Stream 1, the study area is illustrated in the diagram below (a full-size version of the study area is provided in Annex B).

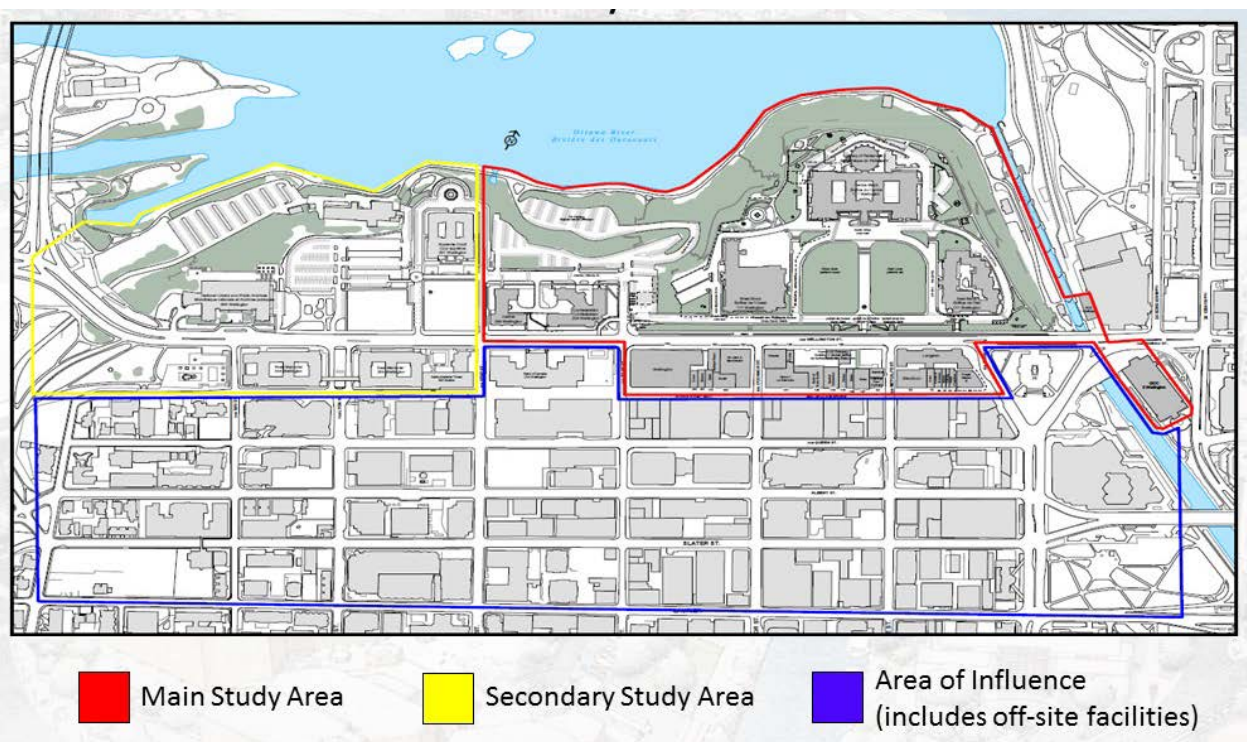


Figure 1 – Study Area

#### **Main Study Area (Red Line) (Parliamentary Precinct)**

## **PROJECT BRIEF**

---

The main study area extends from Kent Street to the Rideau Canal and from the Ottawa River to Sparks Street. It includes Blocks 1, 2 and 3, the Government Conference Centre, and 1 Wellington Street.

These lands are primarily under the mandate of PPB and will be the focus of the Consultant's work. The National Capital Commission has jurisdiction over changes on federally owned lands and will be the formal approval authority for this project.

It is important to note that Parliament Hill is a National Historic Site and re-iterate that the study area contains 28 federally designated and recognized heritage buildings. The profound importance of the site and its significant heritage context will require review and comment from the federal government's heritage steward-the Federal Heritage Buildings Review Office (FHBRO).

### **Secondary Study Area (Yellow Line) (Judicial Precinct and Library and Archives Canada)**

The main study area cannot function efficiently without co-ordination with the Judicial Precinct and Library and Archives Canada sites which are under the mandate of the Real Property Services of PWGSC. While the 2006 LTVP provides high level guidance for the Judicial Precinct, the Judicial Precinct does its own planning for accommodations and facilities. Currently, it is planning the rehabilitation of the Supreme Court of Canada building including the necessary enabling projects in nearby buildings. While the Secondary and Main Study Areas will form the basis of the Campus Master Plan, including the Demonstration Plan, the Consultant must be aware of the nuances related to planning for the Judicial Precinct and Library and Archives Canada properties.

The Consultant Team must co-ordinate and integrate proposals for the Main Study area with plans (existing and under development) for the Secondary Study Area. The opportunity exists to closely align common interests such as infrastructure, material handling, security, parking, and other issues. Close coordination with the Real Property Services and their clients (Supreme Court of Canada and Library and Archives Canada) will be required and the final Campus Master Plan should receive support from this key stakeholder.

### **Area of Influence (Blue Line) (City of Ottawa)**

The Consultant Team must consider the surrounding urban context, broadly defined as, but not limited to, the area south of Sparks Street to Laurier Street, Bronson Avenue to the west side of the Rideau Canal.

Understanding and defining the interface between the Parliamentary Precinct and the area of influence is key to successful integration and creation of a cohesive and continuous public realm. The Consultant Team must study issues such as circulation and connectivity, visitor experience and the impact of bigger moves including a re-imagined Wellington Street and others within the area of influence while respecting jurisdictional authority.



## **PROJECT BRIEF**

---

### **PD 4.1.5 Stream 1 Description**

A high-level summary of the Campus Master Plan for the Parliamentary Precinct and two options is provided below.

#### **Campus Master Plan for the Parliamentary Precinct integrated with the adjacent Judicial Precinct and Library and Archives Canada (LTVP Document Update)**

The Campus Master Plan will establish two planning horizons; a 15-year horizon to 2032 to provide more targeted planning direction to near-term projects, and a long-term horizon of 50 years (to 2067) to establish a broader framework for the evolution of the Precinct. This approach coincides and capitalizes on the opportunity that redevelopment of Blocks 1, 2 and 3 represents, while addressing in a long-term way, significant planning issues including sustainability, climate change resiliency, accessibility and transportation among others. The completed Campus Master Plan will include strategies for new development, urban design, landscape, infrastructure, sustainability and climate change, visitor experience and connectivity. The Campus Master Plan will be developed in collaboration with the Parliamentary Partners and stakeholders and will include a robust and innovative public engagement strategy that targets all demographics.

The Campus Master Plan will result in the following:

- Bilingual Campus Master Plan document with an updated vision, guiding principles, and planning & design principles that reflect the Strategic Directions (Annex A) and an integrated campus approach for the Precinct, including Blocks 1, 2 and 3 (as illustrated in Figure #1).
- Phased Demonstration Plans (above and below grade) illustrating the site in 2032 and at the ultimate 'build-out' shown in 2067. The Plan will delineate boundaries, show future buildings and projects, potential development sites, connectivity, infrastructure, parking and all other major aspects of a Parliamentary Campus.
- Completion of necessary supporting studies and analysis to ensure that the resulting planning framework and Demonstration Plan are practical and applicable. The supporting studies and analysis results will be completed and amalgamated into the Campus Information Model to the level necessary to allow for informed recommendations and decision-making.

#### **Option 1: Implementation Strategy & Cost Estimates**

Option 1, if exercised, will require the Consultant to deliver an implementation strategy and cost estimates for the Campus Master Plan to allow for investment analysis and planning and result in the following:

- A full list of projects required to support the Campus Master Plan, including project descriptions, interdependencies/synergies, enabling actions and any additional studies required.
- High level implementation objectives.
- Sequencing option models including all project phasing scenarios considered.
- List of short, mid and long-term actions to support preferred sequencing scenario.

## **PROJECT BRIEF**

- Class D level costing for each project.

### **Option 2: Synopsis Document**

Option 2, if exercised, will require the Consultant to deliver a bilingual synopsis document that summarizes the Campus Master Plan in a high-level, and non-technical format. It is intended to communicate key elements of the Plan for high level presentations to the public and other groups.

Detailed information on the services required for Stream 1 is contained in the Required Services (RS) section of the brief.

### **PD 4.1.6 Stream 1 Timing and Deliverables**

#### ***PD 4.1.6.1 Timeline***

All deliverables of Stream 1 must be delivered within the timeline detailed below. Meeting the timelines prescribed below is critical to ensure successful planning for key upcoming projects including the Block 2 Redevelopment and the rehabilitation of East Block and the Confederation Building. The timeline for Stream 1 is as follows:

<b>Deliverable:</b>	<b>Timeline:</b>
Final Campus Master Plan	24 months from the date of contract award (includes obtaining NCC approval)
Implementation Strategy and Costing (Option 1)	6 months from the date of Canada exercising Option 1 (post-NCC approval)
Synopsis Document (Option 2)	4 months from the date of Canada exercising Option 2 (post-NCC approval)

#### ***PD 4.1.6.2 Deliverables***

The following is a high-level list of expected deliverables. Refer to the Required Services (RS) section of this brief for a comprehensive deliverables list.

<b>Campus Master Plan (including final Campus Information Model)</b>	<b>Deliverable:</b>
	Project Plan and Project Schedule
	Consultation Strategy/ Presentation and Workshop Materials



**PROJECT BRIEF**

	Three (3) Options for site with a Preferred Option
	Campus Master Plan
	Progress Reports
	Two Phase Demonstration Plans and Models- 2032 and 2067
	Supporting Studies (embedded within the Campus Information Model where applicable)

<b>Option 1</b>	<b>Deliverable:</b>
	List of projects required to support the Campus Master Plan and sequencing
	Implementation Objectives
	List of short, mid and long term-actions to support sequencing
	Class D level costing for each project

<b>Option 2</b>	<b>Deliverable:</b>
	Synopsis Document for media and public use (ex. Building on a Solid Foundation)

***PD 4.1.6.3 Electronic Files***

A chart is provided in the Required Services (RS) section of the brief outlining the deliverables, including electronic files consisting of compact discs(s) containing complete sets of files including:

- PDF files of each report, suitable for printing exact copies of reports with no changes required to the document
- Campus Information Model files in native format and IFC (latest release) or City GML where applicable.
- Source files for all deliverables, such as MS word, MS excel, MS PowerPoint, MS project
- Graphics files such as Jpeg, Gifs, etc. at resolution used in presentations or reports
- 3D files in original format, such as AutoCAD, REVIT, Sketchup

All electronic documents must be compatible with PWGSC's software versions. Ensuring compatibility will be the responsibility of the Consultant Team.

***PD 4.1.7 Existing Documentation******PD 4.1.7.1 Documentation Available to All Proponents***

The following identifies some publicly available existing documentation that will help form an understanding of previously completed work, the context and the assignment.

<b>DOCUMENT TITLE (DATE)</b>	<b>AUTHOR</b>
------------------------------	---------------

## **PROJECT BRIEF**

Site Capacity and Long Term Development Plan - Parliamentary and Judicial Precincts Area 2006 Update (2006) <a href="http://www.csla-aapc.ca/sites/csla-aapc.ca/files/Advocacy/Parl-Jud%20Precincts%20Development%20Plan.pdf">http://www.csla-aapc.ca/sites/csla-aapc.ca/files/Advocacy/Parl-Jud%20Precincts%20Development%20Plan.pdf</a>	du Toit Allsopp Hillier
Building on a Solid Foundation (2007) <a href="http://publications.gc.ca/collections/collection_2013/tpsgc-pwgsc/P4-51-2007-eng.pdf">http://publications.gc.ca/collections/collection_2013/tpsgc-pwgsc/P4-51-2007-eng.pdf</a>	PWGSC

### ***PD 4.1.7.2 Existing Documentation Available to the Consultant***

A list of existing documents available to the Consultant is provided in Annex C.

## **PD 4.2 Stream 2 – Architectural, Engineering and Specialized Services**

The Parliamentary Precinct Branch requires a broad range of general architectural, engineering and other specialized services on an as needed basis over up to the next 15 years to support the continued implementation of the Long Term Vision and Plan (LTVP), as updated by the Campus Master Plan in Stream 1. This requirement includes supporting planning/pre-project technical studies to further define, refine and develop specific projects captured under the Campus Master Plan vision and direction established under Stream 1, as well as the provision of pre-design, design, and/or construction oversight services for selected projects identified in the existing LTVP and as updated by the Campus Master Plan. Although the intent of this stream is largely focused on the provision of planning/pre-project studies (i.e. pre-design services), the Consultant may also be requested via Task Authorization to provide full design and/or construction oversight services for capital construction projects not to exceed \$20 million in construction cost.

### **PD 4.2.1 Stream 2 Context**

The integration of planning services provided under Stream 1 together with multi-disciplinary architectural, engineering and specialized services under Stream 2 aligns well with the Parliamentary Precinct Branch's shift from a building-by-building approach, which has been instrumental to advancing the LTVP with a focus of addressing the major heritage buildings (e.g. West Block and Centre Block notably) to enable rehabilitation of the Centre Block, to a more integrated and holistic campus approach that will encompass the entire Precinct as a cohesive entity. The Integrated Campus Approach best supports the implementation of the LTVP by integrating individual building requirements with strategic campus requirements, such as

## **PROJECT BRIEF**

integrated security, sustainability, vehicular and non-vehicular parking, material handling and waste management.

### **PD 4.2.2 Stream 2 Consultant Services**

In order to achieve the overarching goal of an Integrated Parliamentary Campus, a broad and comprehensive range of multi-disciplinary professional services will be required over the course of up to the next 15 years. Projects or initiatives initially laid out in the Campus Master Plan in Stream 1 are expected to be further developed, detailed and in some cases implemented by the Consultant under Stream 2. This is expected to ensure a seamless integration, consistency of direction, and cohesive alignment of services and objectives over the duration of the mandate. This stream of services will cover the full range of traditional and specialized architectural and engineering services. Given the wide ranging aspects of the mandate, and the unpredictability inherent with the long time frame, the services are structured on an as-needed/as required basis. The work will either consist of a fully integrated multi-disciplinary architectural and engineering service (e.g. Full services including pre-design, design and construction stage services, along with related specialized services), or a as a stand-alone limited specialized mandate requiring one or more limited areas of expertise either performed by the consultant himself or one of his Sub-consultants/ Specialists (e.g. Functional Programming, or Security specialist expertise to undertake a Threat and Risk Assessment). It is noted however that the intent of this stream is largely focused on the provision of pre-design services; whereas design and construction stage services are expected to be required to a lesser extent.

The Consultant must provide comprehensive architectural, engineering and specialized services, either with in-house expertise or through specialists, or a combination of both, in the following areas:

Architecture	IT/Telecommunications	Green Technologies
Heritage Conservation	Traffic	Intelligent/Smart Building Technologies
Structural Engineering	Building Information Modelling (BIM)	Climate Change Vulnerability and Risk Assessment Specialist
Mechanical Engineering	Scheduling	Public Consultation
Electrical Engineering	Cost Estimating	Indigenous Affairs
Civil Engineering	Risk Management	Promotion and Public Relations

## **PROJECT BRIEF**

Geotechnical Engineering	Food Service/Kitchen Design	Presentation Material (various media)
Blast Engineering	Vertical Transportation	Documentation Services
Sustainable Development	Wayfinding and Signage	Shadow/Wind Studies
Urban Planning	Roofing	Building Science
Urban Design	Lighting	Material and Methods Research
Landscape Architecture	Hardware Design	Cultural Anthropology
Building Envelope	Move Coordination	Other specialized services
Building Code Analysis	Industrial Engineering/Material Handling Logistics	
Acoustics	Seismic and Base Isolation	
Security	Fire Code and Fire/Life Safety Engineering	

Specific service requirements will be identified at the time of the Task Authorization for a specific project, including the need for Other Specialized Services not specifically identified in the Project Brief. Refer to RS 2.3.30 for more information. A detailed description of services is provided in the Required Services (RS) section of this brief.

As the Parliamentary Precinct is a complex environment comprising various stakeholders, jurisdictions, approval agencies and clients, the Consultant must engage partners and stakeholders in meaningful and collaborative ways, build consensus, and balance multiple and potentially conflicting requirements and objectives to enable successful project delivery.

### **PD 4.2.3 Stream 2 Goals and Objectives**

The goal is to provide a comprehensive and integrated multi-disciplinary suite of architectural, engineering and specialized services to support the continued implementation of the LTVP. Stream 2 will be used to support PPB Project Delivery Teams working on LTVP-funded initiatives, as well for more detailed technical studies/project definition services required by the Campus Planning & Development group. Stream 2 will not be used for the provision of prime A&E consultant services for projects with construction values exceeding \$20 million. Separate contracts for prime consultant services will be awarded for these projects.

Key objectives for the delivery of services under Stream 2 include: Integrated Delivery, Deliver on Budget, Deliver on Time, Quality, Sustainability, Security, Health & Safety. These overarching

## **PROJECT BRIEF**

---

objectives for Stream 2 may be augmented in Task Authorizations to suit specific project/mandate requirements.

### **Integrated Delivery:**

Deliver services and/or projects utilizing best practices in support of Departmental Representative needs, respecting the approved scope, quality, budget and schedule. Integrated service delivery will be supported by:

- A partnership of open communication and collaboration between all members of the team and stakeholders throughout all phases of delivery;
- Professional conduct in all aspects of the work;
- Active management and oversight by the Consultant to ensure that services and/or projects delivered under Stream 2 are coordinated and consistent with the Campus Master Plan developed under Stream 1.

### **Deliver on Budget**

Delivering services and/or projects under Stream 2 within approved project funding is paramount.

This will be achieved by the Consultant through the following:

- A rigorous cost management system in place to both monitor and report on cost;
- Formal costing submissions for projects (as applicable and specified in TA) in accordance with the Required Services sections of this brief;
- Value engineering and redesign services to be undertaken to maintain project budgets when required;
- Determination of appropriate contingencies;
- Iterative and continuous design analysis and adaptation to maintain cost objective;
- Strong and disciplined change control system;
- Strong communications;
- Management of risk fund.

### **Deliver on Time**

Maintaining the schedule of individual mandates is key to the successful delivery of services and/or projects, as well as the overall successful implementation of the Campus Master Plan. The Consultant team must work proactively to meet established timeframes.

### **Deliver on Quality**

Quality in design and service are of key considerations in the delivery of Stream 2 services. The Consultant must maintain a high standard of service delivery and design quality in all phases of delivery. This will be achieved through:

- Maintaining a high standard of architectural and engineering design;
- All design elements, planning, architectural and engineering, must be fully coordinated

## **PROJECT BRIEF**

---

and consistent in adherence to sound design principles;

- Systems must be of a high quality, designed in response to sound building science lifecycle cost effectiveness, general ease of maintenance and easily repaired and/or replaced and constructed with the best workmanship possible;
- Rigorous quality management reviews during all phases of delivery;
- A rigorous quality management plan in order to respond and correct, in a timely and effective manner, all issues as they occur.

### **Sustainability**

Demonstrating Leadership in Environmental Sustainability is one of the five key Strategic Directions endorsed by Cabinet in 2017 intended to guide and inform the development of the Campus Master Plan. The Consultant must fully integrate sustainable design principles, strategies and PWGSC/PPB sustainability objectives, in all aspects of projects and services delivered under Stream 2, and in alignment with the overarching sustainability strategy developed under Stream 1.

### **Security**

The Parliamentary Precinct portfolio includes assets with stringent security requirements. All services undertaken by the Consultant shall be executed in a way that does not compromise the security requirements of the occupants. All Consultant team members working with sensitive project documentation and visiting buildings must have the appropriate level of security clearance.

### **Health & Safety**

Demonstrating the highest standard of care by the Consultant for ensuring the health and safety of individuals on all mandates undertaken under Stream 2 is paramount.

#### **PD 4.2.4 Stream 2 Property Context**

Projects under Stream 2 will be contained within the **Main Study Area (Red Line) (Parliamentary Precinct)** on Figure 1 which appears in section PD 4.1.4, as well as PPB's Food Production Facility located at 1170 Algoma Road. The area extends from Kent Street to the Rideau Canal and from the Ottawa River to Sparks Street and includes Blocks 1, 2 and 3, the Government Conference Centre, and 1 Wellington Street. These lands are primarily under the mandate of PPB. The National Capital Commission has jurisdiction over changes on federally owned lands and it will be the formal approval authority for certain deliverables, as may be required.

Parliament Hill is a National Historic Site and the main study area contains 28 federally designated and recognized heritage buildings. Subject to the nature and scope of projects

## **PROJECT BRIEF**

---

undertaken under Stream 2, review from the Federal Heritage Buildings Review Office (FHBRO) and the National Capital Commission (NCC), may be required.

### **PD 4.2.5 Stream 2 Description**

Services to be provided by the Consultant under Stream 2 include **Basic Services**, **Additional Services** and **Specialized Services**. A brief overview of these services is provided below; further details can be found in the Required Services (RS) section of this brief.

**Basic Services**, as defined in this brief, are considered to be traditional architectural design services (full/integrated design service) provided by the Consultant as well as basic engineering disciplines including structural, mechanical, electrical, and specification writer and Cost Specialist provided by sub-consultants and/or in-house resources. Basic Services include Pre-design/Design Stage and Construction Stage services are grouped as follows:

#### **Pre-design/Design Stage:**

- Analysis of Project Scope of Work
- Design Concept (Schematic Design)
- Design Development
- Code Compliance and Assessment

#### **Construction Stage Services:**

- Construction Documents, Pre-Tender Construction Cost Estimate and Project Schedule
- Tender Call, Bid Evaluation and Construction Contract Award
- Construction and Contract Administration
- Commissioning
- Post-Construction Warranty Review

**It is important to note that the majority of the requirement for Basis Services under Stream 2 is expected to be focused on Pre-Design/Design Stage services; however, Construction Stage Services may be required.**

**Additional Services** may be required to complete Basic Services in order to suit specific project requirements or as a stand-alone service. These include the following:

- Investigations and Reports
- Functional Programming
- Feasibility Studies
- Interior Design
- Accessibility Audits
- Sustainability Strategies and Reports
- Resident Services during Construction

## **PROJECT BRIEF**

---

- Estimating and Cost Planning
- Risk Management
- Closure Report
- As-built Documentation and Measured Drawings
- Materials and Systems Testing
- Technical Compliance / Peer Reviews / Advisory Services
- Other Additional Services

**Specialized Services** may be required to complete Basic Services and/or Additional Services for a specific project, or may be required as a stand-alone service. Required Services will be specified in Task Authorizations to suit individual project requirements. Refer to section 2.0 Scope of Services of the Stream 2 Required Services section of this Project Brief for a list of Specialized Services.

### **PD 4.2.6 Stream 2 Timing and Deliverables**

#### ***PD 4.2.6.1 Timeline***

Project timing and deliverables for Stream 2 activities will be identified in the individual Task Authorizations which will be issued under the contract. It is expected that Stream 2 services will be required, on as-needed basis, throughout the up to 15-year timeframe of the contract, including the base contract period and option periods should they be exercised.

#### ***PD 4.2.6.2 Deliverables***

Detailed information on the services and deliverables for Stream 2 is contained in the Required Services (RS) section of this brief.

#### ***PD 4.2.6.3 Existing Documentation***

Existing documentation on specific projects will be provided at the time of tasking. The Consultant may refer to Stream 1 reference documentation to gain some insight and context on the LTVP.

### **PD 4.3 Stream 3 – Advocate Architect**

The Parliamentary Precinct Branch requires the services of an Advocate Architect on as-needed basis to support PSPC in the implementation of Campus Master Plan projects, when the chosen method of project delivery has been determined to be a Design-Build or Alternative Form of Procurement (AFP). AFP is defined as a form of delivery which includes any combination of the following components of the

**Design/Build/Finance/Operate/Maintain (DBFOM)** model, in addition to the Design/Build component.



## **PROJECT BRIEF**

---

### **PD 4.3.1 Stream 3 Context**

Critical to the success of the Integrated Campus Approach described in Section PD 4.1.1 is the redevelopment of Blocks 1, 2 and 3 of the Parliamentary Precinct, particularly Block 2. The redevelopment of Block 2 will enable the rehabilitation of the Confederation Building and the East Block, planned to start in 2025, by providing the necessary swing space to accommodate parliamentarians during these two major projects. Block 2 will also be the home of the new space for Indigenous Peoples, as announced by the Prime Minister on June 21, 2017.

The Parliamentary Precinct Branch is considering delivering the Block 2 Redevelopment Project using an AFP. A Procurement Options Analysis (POA) is currently underway by a financial specialist engaged by PWGSC to prepare a comparative assessment of delivery methodologies in view of confirming the viability of an AFP for the Block 2 project.

Other projects within the Parliamentary Precinct, including, but not necessarily limited to, the redevelopment of Block 1 and 3, will be evaluated to review the potential merits of an AFP delivery method. Stream 3 services will be engaged on individual projects through Task Authorizations, which will confirm the scope of services, level of effort, assigned personnel and basis of payment.

### **PD 4.3.2 Stream 3 Consultant Services**

The Consultant must provide comprehensive Advocate Architect services, either with in-house expertise or through specialists, or a combination of both. The Consultant must provide support, as and when required, to PWGSC throughout the stages of AFP-selected projects. The Consultant must work interactively with PWGSC and other consultants engaged separately by PWGSC to facilitate the delivery of projects selected to be delivered following a Design-Build or Alternate Form of Procurement (AFP).

For Stream 3 services, the Consultant must provide comprehensive advocacy services which will require the following areas of expertise:

- Stakeholder Engagement
- Functional Programming
- Public-Private Partnerships (P3)
- Facility Management
- Architecture
- Interior Design
- Structural/Seismic Engineering

## **PROJECT BRIEF**

---

- Mechanical Engineering
- Electrical Engineering
- Civil/Municipal/Transportation Engineering
- Sustainable Design
- Urban Planning
- Crime Prevention through Environmental Design (CPTED)
- Building Envelope
- Project Planning, Monitoring and Control
- Building Information Modeling (BIM)
- Physical Security
- Security Systems
- Acoustic Design
- Lighting Design
- Landscape Architecture
- Telecommunication Systems
- Fire and Life Safety / Code Compliance
- Energy Management and Control Systems
- Commissioning
- Signage
- Hardware consulting including security hardware
- Indoor Air Quality
- Vertical Transportation
- Structured Cabling Design
- Information Management/Information Technology (IM/IT)
- Accessibility
- Quality Control

As the Parliamentary Precinct is a complex environment comprising various stakeholders, jurisdictions, approval agencies and clients, the Consultant must engage partners and stakeholders in meaningful and collaborative ways, build consensus, and balance multiple and potentially conflicting requirements and objectives to enable successful project delivery.

### **PD 4.3.3 Stream 3 Goals and Objectives**

The goal of Stream 3 is to support PWGSC in the delivery of the Block 2 Redevelopment project, if it is decided to be delivered via an AFP and potentially others such as Block 1 and Block 3, as Advocate Architect, to ensure that the design-build team or AFP team, adheres to a high standard of design and construction quality, and conforms to performance

## **PROJECT BRIEF**

---

specifications and design guidelines established for the project.

The overarching objectives described for Stream 2 services in section PD 4.2.3 also generally apply to Stream 3. These include: Integrated Delivery, Deliver on Budget, Deliver on Time, Deliver Quality, Sustainability, Security, Health & Safety. These overarching objectives may be augmented in Task Authorizations to suit specific project requirements.

Additional project-specific objectives relevant to the Block 2 Redevelopment project in the areas of budget and time management are described below:

### **Deliver on Time**

As mentioned previously, Block 2 is an enabler for the rehabilitation of the Confederation Building and the East Block in 2025. Slippage in the implementation of the Block 2 project will have a cascading effect on the implementation of the LTVP which must be avoided at all cost. The Consultant must play a key role as PWGSC's advocate to ensure the schedule is maintained.

### **Deliver on Budget**

Effective cost estimating and cost control are of prime importance and shall be provided by Cost Specialist obtained through a separate contract by PWGSC to work with the Consultant. The Consultant must work collaboratively with the Cost Specialist to ensure that project costs are maintained within the funding envelope.

## **PD 4.3.4 Stream 3 Property Context**

Projects under Stream 3 will be contained within the **Main Study Area (Red Line) (Parliamentary Precinct)** on Figure 1 which appears section PD 4.1.4 of this brief. The area extends from Kent Street to the Rideau Canal and from the Ottawa River to Sparks Street and includes Blocks 1, 2 and 3, the Government Conference Centre, and 1 Wellington Street. These lands are primarily under the mandate of PPB. The National Capital Commission has jurisdiction over changes on federally owned lands and it will be the formal approval authority for project.

## **PD 4.3.5 Stream 3 Description**

### **Block 2**

The redevelopment of Block 2 will provide interim Senate and House of Commons accommodations for the period when other facilities within the Parliamentary Precinct (Confederation Building, East Block) are undergoing renovations that are projected to start in 2025, as well as provide for longer term (post 2030) accommodation space for

## **PROJECT BRIEF**

parliamentary-related functions that are currently occupying lease space in downtown Ottawa. Future accommodations and physical infrastructure include:

- The accommodation of the Parliamentary Partners (Parliamentary office Units, Committee Rooms) and/or federal employees
- An Indigenous Centre based at 100 Wellington in the former US Embassy and the CIBC Building
- Related infrastructure, below grade parking and utilities and connections to adjacent Parliamentary Blocks 1 and 3, and to facilities across Wellington
- Grade level retail space on the south side of Block 2 facing Sparks and/or Metcalfe Streets

### **Block 1**

The Block 1 project will relocate the Privy Council Office, currently located in the Blackburn Building, to an infill building to be constructed on the adjacent site to the east which is currently occupied by five aging and underperforming assets consisting of Saxe Canada Life, House of Norcano, Nelms, O'Brien and Hope Chambers). Once completed, the Blackburn and the infill will serve as swing space for the Prime Minister's office, enabling rehabilitation of the Office of the Prime Minister and Privy Council Building (formerly Langevin Building). Once the project is complete, the Privy Council Office would consolidate its operations, which are currently dispersed in crown and leased facilities, into Block 1.

### **Block 3**

The Block 3 project will include the restoration of the National Press Building and the construction of an infill between the Booth and Wellington Buildings to consolidate Parliamentary accommodations currently dispersed in Crown and leased space throughout Ottawa.

Other projects requiring Advocate Architect services may be identified as the Campus Master Plan is completed under Stream 1 of this contract.

## **PD 4.3.6 Stream 3 Timing and Deliverables**

### ***PD 4.3.6.1 Timeline***

The indicative timeline for Stream 3 is provided below. A more detailed timeline broken by phase is provided for Block 2 given the current level of advancement of the project.

<b>Indicative Timeline - Block 2 Redevelopment</b>
--

**PROJECT BRIEF**

Planning/Design	2018 - 2021
Construction	2021 - 2026

Phase	Date
Contract Award	Fall 2018
Phase 1 – Pre-Procurement	Fall 2017 – Fall 2019
Phase 2 – AFP Procurement	Fall 2019 – Winter 2021
Phase 3 – Design and Construction	Winter 2021 – Summer 2026
Phase 4 – Post-Construction	Summer 2026 – Summer 2027

Indicative Timeline - Block 1 Redevelopment	
Planning/Design	2021 - 2023
Construction	2023 - 2028

Indicative Timeline - Block 3 Redevelopment	
Planning/Design	2027 - 2029
Construction	2029 - 2033

**PD 4.3.6.2 Deliverables**

Stream 3 Consultant services are expected to be generally structured into four phases:

- Phase 1 – Pre-procurement
- Phase 2 – Procurement
- Phase 3 – Design & Construction
- Phase 4 – Post Construction

Detailed information on the services and deliverables for Stream 3 is contained in the Required Services section of the brief.

**PD 4.3.7 Existing Documentation Available to the Consultant**

Development of the preliminary functional program, Technical Requirements, Design Guidelines and Project Specific Performance Specifications (PSOS) for Block 2, as well some early technical studies to support the Block 2 project have been initiated by PWGSC to advance the project schedule. Key early technical studies include:

- Detailed geotechnical assessment including determination of seismic Site Class
- Detailed Designated Substances (DSR) Report including gap analysis, non-

## **PROJECT BRIEF**

---

intrusive and intrusive sampling and testing.

The studies are expected to be completed or partially completed by the date of award of this contract. All reports and other documents from these studies that are available when the Consultant begins their mandate will be provided. The Consultant must coordinate its services with the previously engaged consultants if any of the studies have not been completed when it starts its mandate.

The following key documents will be made available to the Consultant in their original language following contract award:

- Block 2 Pre-Design Functional Program, Technical Requirements and Design Guidelines (DFS Architects, anticipated to be completed by April 2018)
- South of Wellington Development Capacity Analysis Study, Block 1, 2 and 3 (Vlan + Civiliti / Provencher Roy, August 28, 2017)
- Blocks 1, 2, 3 Master Planning Framework (IBI Group, 2014)
- Asset Condition Reports (Building Condition Reports 2012-2013 and Asset Management Plans 2016)
- Geotechnical Assessment Report (referenced above)
- Designated Substances Report (DSR) (referenced above)
- Other relevant background documents/reports and information as required for use by the Consultant

## **PROJECT BRIEF**

---

### **PROJECT ADMINISTRATION AND GOVERNANCE (PA)**

#### **PA 1 General Information**

- PA 1.1 Roles and Responsibilities
- PA 1.2 Coordination with Departmental Representative
- PA 1.3 Health and Safety
- PA 1.4 Project Response Time Requirements
- PA 1.5 Official Languages

#### **PA 2 Functional Requirements**

- PA 2.1 Design Codes, Regulations and Reference Documents
- PA 2.2 Project Delivery Approach
- PA 2.3 Media
- PA 2.4 General Project Deliverable
- PA 2.5 Acceptance of Project Deliverables
- PA 2.6 Awards

#### **PA 3 Project Governance**

- PA 3.1 PWGSC Governance
- PA 3.2 Parliamentary Partners
- PA 3.3 Indigenous Communities
- PA 3.4 Stakeholders
- PA 3.5 Authorities Having Jurisdiction

## **PROJECT BRIEF**

---

### **PA 1 GENERAL INFORMATION**

#### **PA 1.1 ROLES AND RESPONSIBILITIES**

##### **PA 1.1.1 DEPARTMENTAL REPRESENTATIVE**

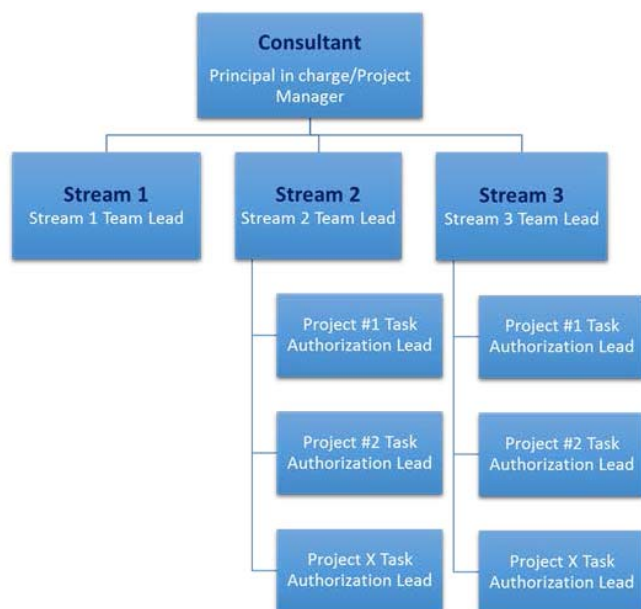
1. For Stream 1, a Departmental Representative will be identified following contract award. For Streams 2 and 3, a Departmental Representative will be identified in each Task Authorization. The Departmental Representative is the liaison between the Consultant, PWGSC and Client/Users. The Consultant must communicate solely with the Departmental Representative unless otherwise directed by the Departmental Representative. There must be no direct official contact between Clients/Users and the Consultant unless directed by the Departmental Representative.
2. The Departmental Representative for each project, has overall responsibility for the progress of the project, including management, administration and coordination of the activities as set out in this document and in a Task Authorization which has previously been reviewed and accepted.

##### **PA 1.1.2 THE CONSULTANT**

1. The Consultant is responsible for the delivery of the Consultant Team's services, including management, administration, co-ordination and reporting of the activities by the Consultant Team as set out in this document.
2. The contract includes three service Streams: Stream 1 - Campus Master Plan for the Parliamentary Judicial Precinct and Library and Archives Canada Site; Stream 2 - Architectural, Engineering and Specialized Services; Stream 3 – Advocate Architect Services. As part of the Submission Requirements and Evaluation, the Consultant must provide an organization chart indicating how the services of their employees and sub-consultants will be organized. Resources can be included for more than one stream, but all resources identified must meet the specific requirements for the Stream. The organization chart is to be updated by the Consultant as required when significant changes occur during the contract. A high level organization chart depicting the Consultant lead resources is shown in Figure 1.



## **PROJECT BRIEF**



*Figure 1 – Consultant Lead Resources*

3. The Consultant is responsible for gathering and identifying the needs of the Clients/Users and incorporating those needs into the required project deliverables once written acceptance is issued by the Departmental Representative.
4. The Consultant must deliver the services within the time frame and assigned budget in accordance with the contract documents, and for Streams 2 and 3, as per the Approved Task Authorizations.
5. The Consultant is responsible for producing all services described in the Project Brief, as well as further defined in Task Authorizations for Streams 2 and 3, in a conscientious and professional manner.
6. The Consultant must coordinate project requirements with any other adjacent and site work that may be underway.

### ***PA 1.1.2.1 Principal in Charge/Project Manager***

The Principal in Charge/Project Manager must hold a Senior Executive position in the Consultant's organization, and must, at a minimum:

## **PROJECT BRIEF**

---

1. Be the primary contact for this contract and the recipient of individual Task Authorizations under the contract, and be the formal issuer of the Consultant's proposal regarding Task Authorizations.
2. Ensure that Completed Task Authorizations are submitted by the Consultant within five days, unless directed otherwise in the Issued Task Authorization from the Departmental Representative.
3. Be the primary contact for the Departmental Representative regarding performance and/or quality issues arising during execution by the Consultant Team. A maximum response/contact time of 24 hours is required at all times.
4. Disseminate performance and quality issues to pertinent parties within the Consultant Team and ensure that problems and difficulties are quickly and permanently resolved.
5. Ensure high quality of services delivered by the Consultant Team at all times, through on-going internal Quality Reviews. Ensure proper coordination of services and deliverables between all disciplines.
6. Ensure a comprehensive, in-depth approach to all matters pertaining to public safety and to the mandate of the Consultant Team.
7. Ensure timely commencement, delivery, and overall completion of mandates.
8. Ensure quick response time, prompt execution and on-schedule completion of all services by all members of the Consultant Team, including, if necessary, rapid replacement of notably under-performing personnel and/or sub-consultants.
9. Ensure on-going fiscal responsibility of all members of the Consultant Team.

### ***PA 1.1.2.2 Stream Team Lead***

1. A Consultant Stream Team Lead is to be designated from among senior staff of the Consultant's firm for each one of the three Streams, unless otherwise specified by the Departmental Representative.
2. The designated Consultant Stream Team Lead will work in collaboration with the Principal in Charge/Project Manager and Task Authorization Team Leads to ensure efficient, timely and quality delivery of services to PWGSC.

## **PROJECT BRIEF**

---

### **PA 1.1.2.3 Task Authorization Team Lead (applicable for Streams 2 and 3 only)**

1. For each Task Authorization issued under Streams 2 and 3 of this contract, a Consultant Task Authorization Team Lead is to be designated from among senior staff of the Consultant's firm who is also specifically named on the Task Authorization, unless otherwise specified by the Departmental Representative.
2. The designated Consultant Task Authorization Team Lead must be in full control of project time assignments for each individual member of the Consultant's Team proposed for a specific Task Authorization.

### **PA 1.1.3 GENERAL INSTRUCTIONS**

For any of the Required Services listed in Required Services (RS) section the Project Brief, the Consultant must:

1. Co-ordinate and attend regular meetings every two (2) weeks during the life of the project with members of the core PWGSC Project Team. The Consultant must record the issues and decisions and prepare and distribute minutes within three (3) working days of the meeting. PWGSC will have five (5) working days to comment on the content of the minutes for updating.
2. Submit weekly project progress reports to the Departmental Representative.
3. If a Client requests a change that may alter the scope of work or add to the cost of the project, and/or the cost of services, obtain written approval of the Departmental Representative prior to proceeding.
4. All design work prepared by the Consultant and his sub-consultants and specialists must be signed, sealed and dated by a Professional licensed in the province of Ontario for each of their respective disciplines such as: Licensed Architect in Ontario (OAA member), Professional Engineer (P.Eng) for engineering disciplines, Licensed Interior Designer (ARIDO member), etc.

### **PA 1.2 COORDINATION WITH DEPARTMENTAL REPRESENTATIVE**

The Consultant must:

1. Carry out services in accordance with the contract, Approved Task Authorizations for Streams 2 and 3 and directions given by the Departmental Representative.

## **PROJECT BRIEF**

---

2. Correspond only with the Departmental Representative at the times and in the manner dictated by the Departmental Representative.
3. Ensure all communications carry the appropriate Project Title, Project Number and File Number.
4. Advise the Departmental Representative of any changes that may affect schedule or budget or are inconsistent with instructions or written approvals previously given. The Consultant shall detail the extent and reasons for the changes and obtain written approval before proceeding.

### **PA 1.3 HEALTH AND SAFETY**

1. PWGSC recognizes its obligation to protect health and ensure safety of all persons working on projects for which it manages consultant and construction contracts. It also recognizes that federal occupational health and safety legislation places certain specific responsibilities upon PWGSC as the employer and on Other Government Departments as owners of the work place.
2. To meet those responsibilities, the Consultant must implement due diligence to help ensure that roles and responsibilities assigned under Part II of the Canada Labour Code and the Canada Occupational Health and Safety Regulations are implemented and observed when involving consultant staff to undertake works on federal sites and work places.

### **PA 1.4 PROJECT REVIEW AND RESPONSE TIME REQUIREMENTS**

1. With regards to Streams 2 and 3, the Consultant will be provided a scope of services and given a reasonable deadline for submission of the Returned Task Authorization. The submission deadline will be established by the Departmental Representative and will be based on the size and complexity of project.

Canada reserves the right to contract separately with other firms/consultants should the Consultant fail to meet the submission deadline in a timely manner.

2. On occasion there may be urgent, problem-solving meetings. It is a requirement of all mandates covered under this contract that the Key Personnel of the Consultant Team be personally available to attend meetings in Ottawa, undertake presentations and respond to inquiries within one (1) working days' notice and the response must be to the satisfaction of the Departmental Representative

## **PROJECT BRIEF**

---

3. Work in progress will be reviewed on a continuous basis by the Departmental Representative and other technical advisors, consultants, stakeholders, or internal staff. Presentations are required for design and project approvals in accordance with the Required Services section of this brief, and as stipulated in Task Authorizations. Presentations for workshops or external groups must be prepared and issued to PPB a minimum of 5 days in advance for review.

Specific to Stream 1, for draft report printed deliverables, a minimum of three (3) calendar weeks is required for review. For final report printed deliverables, a minimum of five (5) calendar weeks is required for review.

For Stream 2 and 3 deliverables, a minimum review of two (2) calendar weeks are to be anticipated for reviews by default, unless otherwise specified in individual Task Authorizations.

### **PA 1.5 OFFICIAL LANGUAGES**

Language Requirements applicable to this contract are described in the Supplementary Conditions, and as supplemented below.

Stream 1 requires final deliverables in both official languages. The language of deliverables is detailed in the Required Services section of the Brief, with key requirements outlined below:

- During development of the Campus Master Plan, the Consultant Team must be able to provide bilingual (French and English) services orally throughout the project and in writing for the development of the draft and final Campus Master Plan (Required Services RS5 and RS 6).
- The Consultant must be able to conduct bilingual workshops (orally) with stakeholders but minutes and notes must be in English. The language of presentation material will vary based on audience and is noted in the individual Required Services sections in the deliverable tables.
- Final documents (Required Services RS6, RS7, RS8) must be provided in English and French. The Consultant must provide draft versions of these reports in each language for review by PWGSC. Any required revisions must be completed before final publication of documents.

Unless otherwise specified in individual Task Authorizations for Streams 2 and 3, draft and final deliverables will generally be required in English. Additionally, the Consultant must have the ability to provide bilingual (French and English) services orally, as may be required for meetings, workshops and presentations.

## **PROJECT BRIEF**

---

Contract deliverables must meet the following criteria:

- The languages are considered equal in status - neither is a translation of the other;
- The Consultant Team is responsible for translating all required documents, the accuracy and completeness of translations and the consistency of documents;
- It is standard practice to produce drawings (originals) on which written information is shown in both languages, and for written reports, separate written documents in each language, where applicable.

## **PA 2 FUNCTIONAL REQUIREMENTS**

### **PA 2.1 DESIGN CODES, REGULATIONS AND REFERENCE DOCUMENTS**

1. The Consultant must comply with all statutes, codes, regulations, standards, guidelines and by-laws applicable and where necessary, must review the deliverables with those public authorities having jurisdiction in order that the consents, approvals, licenses and permits required for the project may be applied for and obtained.
2. The Consultant must utilize the latest editions of the applicable codes, standards, guidelines, regulations and by-laws. Public authorities having jurisdiction shall review the deliverables to obtain and apply approvals and permits required for the project. In cases of overlap, the most stringent will apply. Refer to PWGSC document "Doing Business with PWGSC" attached in Appendix D for a minimal list of applicable codes, regulations, standards and guidelines. Additional standards/guidelines/codes may be specified in individual Task Authorizations.

### **PA 2.2 PROJECT DELIVERY APPROACH**

1. The project delivery approach for construction projects undertaken under Stream 2 will be specified in individual Task Authorizations. The Consultant may be required to prepare and coordinate the tender package in the case of a Design-Bid-Build delivery approach, or Work Packages in the case of Construction Management delivery approach. The project delivery approach applicable under Stream 3 is Design/Build or AFP.

### **PA 2.3 MEDIA**

1. The Consultant must not respond to requests for project related information or questions from the media. Such inquiries are to be directed to the Departmental Representative.

## **PROJECT BRIEF**

---

### **PA 2.4 GENERAL PROJECT DELIVERABLES**

1. Where deliverables and submissions are required, they shall meet the requirements of this section, unless noted otherwise in individual Task Authorizations for Stream 2 and Stream 3 services.
2. Printed project deliverables must be printed on recycled paper containing fiber certified as originating from a sustainably-managed forest and containing minimum 30% recycled content. Reports must be bound, with card stock covers. Digital files of all deliverables must be in a printable file format such as PDF as well as original source files for all graphics and text, digital models and spreadsheets. Digital files must be in the following formats, where appropriate: MS Word, MS Excel, PDF and/or JPEG.
3. Where deliverables include presentations, such as digital presentations, presentation boards, plans, agendas, 3D models, comment sheets or other materials, hard copies must be provided of all presentation material plus one (1) copy in digital format. Digital files must be in the following formats where appropriate: MS Word, MS PowerPoint, PDF and/or JPEG. Source files for all graphics and text must also be provided, including 3D work and models.
4. All specifications and drawings must be generated and distributed in the format using layering and file protocols as prescribed in the "Doing Business with PWGSC" in Appendix D.
5. For Stream 1 deliverables, the quantity and format of each deliverable is specified in the Required Services section of the Brief. For Stream 2 and 3 deliverables, unless otherwise indicated in Task Authorizations, provide six (6) copies of all deliverables plus one electronic version in a format using PWGSC operational platforms such as: Microsoft (Word and Excel), MS Project, AutoCAD latest version and NMS latest version. In addition, provide PDF electronic copy of all final reports and contract documents. All submissions and electronic documents must be signed, sealed and dated by a Professional licensed in the province of Ontario for each of their respective disciplines: Licensed Architect in Ontario (OAA member), Professional Engineer (P.Eng) for engineering discipline, Licensed Interior Designer (ARIDO member).

For design, documentation and submission standards relating to the services provisions herein refer to PWGSC document "Doing Business with PWGSC" attached as Appendix D to this document.

## **PROJECT BRIEF**

---

For Streams 2 and 3 the schedules for the delivery of services will be determined at the time of each individual Task Authorization.- For Stream 1 the schedule for delivery of services is included in the Required Services section of the Brief.

### **PA 2.5 ACCEPTANCE OF PROJECT DELIVERABLES**

1. While PWGSC acknowledges the Consultant's obligations to meet project requirements, the project delivery process entitles PWGSC to review the Consultants services and deliverables. PWGSC reserves the right to reject undesirable or unsatisfactory services and/or deliverables. The Consultant must obtain Departmental Representative acceptances of deliverables.
2. Acceptances indicate that based on a general review of deliverables for specific issues, the deliverables are considered to comply with governmental and departmental objectives and practices, and that overall project objectives are being satisfied.
3. Acceptances by the Client / Users and other agencies and levels of government must be obtained to supplement PWGSC acceptances. The Consultant shall assist the Departmental Representative in securing all such acceptances and adjust all documentation as required by such authorities when securing acceptance.

### **PA 2.6 AWARDS**

The Consultant Team must inform and obtain approval from the Departmental Representative in advance of any submissions of the project for any awards or recognitions. All material concerning the project must be reviewed by the Departmental Representative prior to being submitted.

## **PA 3 PROJECT GOVERNANCE**

PWGSC requires that the Stream 1 project, as well as tasks under Streams 2 and 3 be organized, managed and implemented in a collaborative manner. Team members are to work cooperatively within their own teams and any other PWGSC-retained consultants at every stage to ensure the successful completion of mandates.

The sensitivities associated with planning and delivering projects for such an important site must be reflected in a consultation and engagement program that builds consensus amongst a diverse range of government and non-government stakeholders. A list of anticipated project participants is also provided in Figure 2.

### **PA 3.1 PWGSC GOVERNANCE**



## **PROJECT BRIEF**

---

As a major Government Department overseeing multiple projects, PWGSC is subject to several Governance Protocols in the planning and execution of projects. Reviews, endorsements, and approvals are in place to protect the public interest, ensure responsible use of public funds, achieve project objectives, ensure stakeholder engagement and satisfaction, and communicate project progress. The Consultant Team must schedule time for approvals, endorsements and other governance activities in the Project Plans.

### **PA 3.2 PARLIAMENTARY PARTNERS**

The Senate, House of Commons, Library of Parliament, Parliamentary Protective Service, as well as the Privy Council Office are the primary Clients/Users' and the main constituents of the accommodation and implementation plans. They define their requirements, programming, accommodation needs and projections, and are active partners in all aspects of the Campus Master Plan and its implementation.

### **PA 3.3 INDIGENOUS COMMUNITIES**

With the Parliamentary Precinct being located on un-ceded Algonquin land and 100 Wellington Street becoming a space for Indigenous Peoples, engaging Indigenous communities as part of the project process will be key for the Campus Master Plan completed under Stream 1. The broader Public Engagement Plan must identify how the Consultant will engage Indigenous Communities specifically.

### **PA 3.4 STAKEHOLDERS**

A primary challenge of planning for the Parliamentary Precinct is its complex multi-jurisdictional environment. For the purposes of the Stream 1 project, the Consultant, while reporting to the Departmental Representative, will be required to develop a good understanding of the relationship between the various agencies and bodies, and be able to incorporate reporting, review processes, and mechanisms that recognize and respect this complex multi-jurisdictional-environment and the impact that it may have on the project timelines and deliverables.

Primary stakeholders include: Judicial Precinct, Library and Archives Canada, National Capital Commission and City of Ottawa.

#### **PA 3.4.1 Public Stakeholders and Special Interest Groups**

As a priority for the Government of Canada, and a Strategic Direction of the Campus Master Plan under Stream 1, a Public Engagement Plan will be developed and undertaken. The Consultant will prepare a robust and innovative Public Engagement Plan that engages a broad cross-section of the population including children and youth. The Consultant is expected to consider all mediums of engagement including online and in-person formats and platforms in order to reach the largest number and widest range of demographic representations as possible. The Public Engagement Plan will cover the following topics: environmental sustainability and climate change resilience,

## **PROJECT BRIEF**

---

circulation, visitor experience and urban design (described in detail the Project Description section of the brief).

### **PA 3.5 AUTHORITIES HAVING JURISDICTION**

Applicable codes, regulations, by-laws and policies of other authorities having jurisdiction shall be considered and identified by the Consultant Team, unless otherwise directed by the Departmental Representative.

#### **PA 3.5.1 NATIONAL CAPITAL COMMISSION (NCC)**

In accordance with the National Capital Act, the NCC is responsible for co-ordinating and approving development on federal lands in the National Capital Region. Senior NCC staff, the Advisory Committee on Planning, Design and Realty (ACPDR), the NCC Board of Directors or its Executive Committee provide planning and urban design advice and decisions related to federal development plans/ proposals in the Capital. As part of the Campus Master Plan in Stream 1, the NCC will be invited to participate in workshops and presentations, and ultimately approvals will be sought from the NCC for the final Campus Master Plan. The Consultant will be responsible for obtaining those approvals and co-ordinating the consultation process with the NCC. Projects undertaken under Stream 2 and 3 of this contract may require consultations with the NCC, which will be determined on an as-needed basis in the Task Authorizations.

#### **PA 3.5.2 FEDERAL HERITAGE BUILDINGS REVIEW OFFICE (FHBRO)**

The primary objective of Parks Canada's Federal Heritage Buildings Review Office (FHBRO) is to assist federal government departments in the protection of their heritage buildings. FHBRO's principal role is to advise custodian departments on how to meet their heritage obligations under the Treasury Board Policy on Management of Real Property, including the review of proposed interventions to "Classified" federal heritage buildings and landscapes. As part of the Campus Master Plan in Stream 1, FHBRO will be an invited stakeholder for workshops. Presentations and submissions of the draft and final Campus Master Plan to FHBRO for a formal 'review of intervention' will be required. Projects undertaken under Stream 2 and 3 of this contract may require consultations with FHBRO, which will be determined on an as-needed basis in the Task Authorizations.

#### **PA 3.5.3 CITY OF OTTAWA**

The City of Ottawa is responsible for streets, utilities, servicing, city policing, city planning and other municipal functions. In collaboration with PWGSC, the City of Ottawa is currently developing a plan to revitalize Sparks Street, among other initiatives. As part of the Campus Master Plan in Stream 1, the City of Ottawa will be invited to participate in workshops and presentations, with emphasis on co-ordinating our role in Sparks Street and Wellington Street plans. Projects undertaken under

## **PROJECT BRIEF**

---

Stream 2 and 3 of this contract may also require consultations with the City of Ottawa, which will be determined on an as-needed basis in the Task Authorizations.

## PROJECT BRIEF

The chart below illustrates the complex multi-jurisdictional environment that the Consultant must work in. Although it will be most applicable to Stream 1, it also has relevance for Streams 2 and 3.

CORE TEAM	PARLIAMENTARY PARTNERS	STAKEHOLDERS	SPECIAL INTEREST GROUPS	INDIGENOUS ORGANIZATIONS	ADDITIONAL GROUPS
PPB	Senate	National Capital Commission	Sparks Street Mall BIA & Authority	Assembly of First Nations	General Public
Consultant Team	House of Commons	Federal Heritage Buildings Review Office	Ottawa Centre Eco-District	Inuit Tapiriit Kanatami	
	Library of Parliament	Real Property Branch	Invest Ottawa	Métis Nation	
	Parliamentary Protective Service	Supreme Court of Canada	Ottawa River Keeper	Algonquins of Ontario	
	Privy Council Office	Library and Archives Canada	Ottawa & Gatineau Tourism	Kitigan Zibi Anishinabeg	
		RCMP & Prime Minister Security	Heritage Ottawa	Other Indigenous Organizations	
		City of Ottawa	National Trust		
		City of Gatineau	Others		
		Canadian Heritage			

Figure 2 – Anticipated Project Participants

## **PROJECT BRIEF**

### REQUIRED SERVICES (RS)

#### STREAM 1 REQUIRED SERVICES

##### 1.0 CONDITIONS OF WORK

As required, the Consultant will be provided with background materials and other departmental documentation by the Departmental Representative. The Consultant is expected throughout the course of the project to consult with PWGSC, the NCC, City staff and other stakeholders as required to gather/confirm relevant information. All consultations with various internal and external stakeholders shall be organized through the Departmental Representative unless otherwise directed.

The Consultant shall complete the tasks and deliverables as stipulated in the Scope and Activities/ Deliverables section of each stage of the project. The Consultant must provide all deliverables to PWGSC Departmental Representative at the end of the assignment in an electronic/digital format. The deliverables must include those reports/ documents/ graphics material, etc. noted in the Scope and Activities/ Deliverables.

##### 2.0 PUBLIC ENGAGEMENT PLAN

With public engagement being a key strategic objective for the Campus Master Plan, the Consultant must develop an innovative and broad ranging Public Engagement Plan. The Public Engagement Plan must incorporate strategies for engaging youth, new Canadians and Canadians nationally given the significance of the site. As such, the Public Engagement Plan should set and meet ambitious targets for engaging new, diverse and underrepresented groups not only locally but nationally.

Canada's Indigenous communities will be engaged as a part of the project through a separate and distinct engagement process. To this end, the Consultant must deliver five (5), full- day, bilingual workshops with presentations and discussions with Indigenous communities, in addition to those outlined in the RS sections that follow. Scheduling of these workshops and content will be established with the Consultant in the RS1 stage. The Consultant must recommend best engagement approaches based on the Consultant's knowledge and past experience of engaging with Indigenous communities. The Consultant will work with PWGSC to finalize the draft engagement strategy submitted as part of the response to this RFP during the RS1 stage.

##### **Deliverables:**

RS	Deliverable Type (all deliverables must be provided in draft and final format)	Title	Format	Language
1	Report	Draft Public Engagement Plan	Electronic	English

## **PROJECT BRIEF**

2	5 Workshop Presentations	Consultation	Electronic	Bilingual
3	Electronic Files	All materials	As specified by PWGSC	

## **RS 1 STAGE ONE: PROJECT AND BACKGROUND REVIEW**

### **1.1 INTENT**

The purpose of this stage is to ensure the Consultant has reviewed and integrated all the project requirements, identified and evaluated constraints and opportunities, and provided alternative strategies to undertake the project.

The Consultant must obtain written authorization from the PWGSC Departmental Representative before proceeding with Stage Two.

### **1.2 SCOPE AND ACTIVITIES/ DELIVERABLES**

The Consultant must undertake the following scope and activities as part of Stage One:

- Review all relevant documentation (see Annex C)
- Attend an introductory meeting (approx. 2 days) with PWGSC Project Teams.
- Complete a site visit of subject lands and surrounding area (approximately 1 day) with the Departmental Representative.
- Analyse the project requirements provided by PWGSC; identify information gaps and issues that need to be addressed.
- Prepare, submit, present and regularly update the Project Delivery Plan. The Consultant must update the Project Delivery Plan throughout the duration of the project and use it as a benchmark control document to monitor the progress of the project and as a basis for regular reporting and as a record of proposed and ongoing collaboration and technical digital workflows.
- Project Delivery Plan must include at minimum:
  - A detailed approach and methodology for management of the project.
  - A project schedule with key milestones and timelines.
  - Staff resource plan.
  - Public Engagement Plan.
  - Process Maps to the Business Process Mapping Notation (BPMN) Standard, outlining Campus Information Modeling processed used on the project.
  - A schedule of all technologies, software and hardware used to complete relevant studies, modeling and outcomes.
  - A communication plan outlining proposed approach for communication / consultation with Parliamentary Partners and stakeholders.

## **PROJECT BRIEF**

- Risk management plan and risk register, for minimum monthly review.
- Co-ordinate and attend regular bi-weekly project team meeting(s).

### **Deliverables:**

RS1	Deliverable Type (all deliverables must be provided in draft and final format)	Title	Format	Language
1	Report	Project Delivery Plan	Electronic	English
2	Report	Public Engagement Plan	Electronic	English
3	Report	Information Gaps Report	Electronic	English
4	Meeting Agendas and Minutes		Electronic	English

## **RS 2 STAGE TWO: PLANNING SUMMITS AND VISIONING**

### **2.1 INTENT**

The intent of this stage is to host a number of introductory events to present the project and, renew the vision and guiding and design principles from the 2006 LTVP.

The Consultant will plan, coordinate and facilitate three (3) bilingual and aspirational 'Planning Summits' to build excitement for the project and start the process of establishing a renewed vision for the Parliamentary Precinct for the next 50 years. Each summit will target a different group and content will need to be adapted accordingly. One of the summits will be a public summit. In keeping with the Public Consultation Plan, the summit will include diverse groups including youth and create opportunities for national participation allowing Canadians from coast-to-coast-to-coast to imagine the next 50 years in the Precinct.

The Consultant must obtain written authorization from the PWGSC Departmental Representative before proceeding with Stage Three.

### **2.2 SCOPE AND ACTIVITIES / DELIVERABLES**

The Consultant must undertake the following Scope and Activities as part of Stage 2:

- Develop a detailed plan for each of the three (3) 'Planning Summits'. Opportunities to partner with stakeholders such as the National Capital Commission's Urbanism Lab series will be explored.

## **PROJECT BRIEF**

- Prepare all event material, including agenda, presentation material, communication products, panels and display boards, invitations and/or advertisements for each event.
- Coordinate and facilitate each session (rooms, hospitality, and equipment to be supplied by PWGSC).
- Prepare a summary of all comments and identify key themes/conclusions.
- Review the 2006 Vision, Guiding Principles, and Planning and Design Principles to identify relevant elements, gaps, weaknesses and necessary modifications in light of project priorities/requirements.
- Prepare a PowerPoint presentation summarizing findings of the task above.
- Coordinate and lead a workshop session (approximately ½ day) with PWGSC, Parliamentary Partners and stakeholders to present their findings and validate the vision for the Campus Master Plan 2067.
- Prepare a draft and final report summarizing the findings from the tasks above.
- Update the Project Delivery Plan.
- Co-ordinate and attend bi-weekly project team meeting(s).
- Commence supporting studies.

### **Deliverables:**

RS2	Deliverable Type Deliverable Type (all deliverables must be provided in draft and final format)	Title	Format	Language
1	Report	Engagement and Event Plans	Electronic	English
2	3 Planning Summits (each presentation tailored to audience as appropriate)	Planning Summit	Electronic (compatible with any chosen platform for engagement)	Bilingual
3	Report	Planning Summits Summary of Findings	Electronic	English
4	Event Materials	All relevant materials (agenda, communication products, panels/display boards, invitations and advertisements)	Various	Bilingual
5	Workshop Presentation	Vision, Guiding Principles, and Planning & Design Guidelines	PowerPoint	English
6	Report	Vision, Guiding Principles, and Planning & Design Guidelines Validation	Electronic	English
7	Meetings	Agenda and Minutes	Electronic	English



## **PROJECT BRIEF**

---

### **RS 3 STAGE THREE: ANALYSIS OF PROJECT REQUIREMENTS**

#### **3.1 INTENT**

The intent of this phase is to work closely and collaboratively with the Parliamentary Partners through the Departmental Representative to analyze the project requirements that will form the Campus Master Plan based on findings from Stages 1 and 2. A number of the project requirements will require engagement with stakeholders and also form topics for the Public Engagement Plan.

The outcome of the consultations and defined project requirements must be captured in position papers. The purpose of the position papers is to inform the development of site-wide options in subsequent phases by building consensus on the acceptable approach, establishing clear objectives, criteria, and exploring a range of possible ways to meet these objectives among others.

The Consultant must obtain written authorization from the Departmental Representative before proceeding with Stage Four.

#### **3.2 SCOPE AND ACTIVITIES/ DELIVERABLES**

The Consultant shall look for synergies and opportunities across the project requirements, anticipating potential beneficial interactions. Similarly, potential conflicts or complications between project requirement objectives shall be identified.

The Consultant must complete the following services for each project requirement listed further below under the Project Requirements heading:

- Review previous efforts, all related relevant background information, reports, analyze the information and prepare a gap analysis.
- Complete benchmarking, review case studies research best practices and standards and summarize the findings.
- Identify, list, and characterize potential objectives and presents findings for feedback and revisions;
- Develop evaluation criteria for objectives and opportunities, constraints, challenges for meeting identified objectives.
- Develop a summary Position Paper (draft and final).
- Prepare for and hold workshops with the Parliamentary Partners on project requirements (anticipate 2 to 3 workshops per project requirement). All workshops will be half-day unless otherwise specified, with the Consultant expected to cost for time required to organize, plan, prepare and execute the workshop.
- Prepare and distribute minutes/record decisions for all meetings/workshops/information sessions.

## **PROJECT BRIEF**

---

- Update the Project Delivery Plan.
- Co-ordinate and attend bi-weekly project team meeting(s).

### **Project Requirements**

In addition to the activities identified above, a number of the project requirements have specifics that must be addressed as part of this stage. The Consultant must cover these specifics in their engagement with the Parliamentary Partners and other stakeholders but also to carry out the necessary background research to provide guidance and information to the Departmental Representative and the Parliamentary Partners. A key objective for all project requirements is facilitating campus integration and achieving consensus and centralizing information within a Campus Information Model.

#### **1. Accommodation**

The provision of Parliamentary accommodations is one of PPB's key mandates. The Consultant will work with the Parliamentary Partners through the Departmental Representative to define their demand for accommodations (Parliamentary office units, committee rooms, multi-purpose rooms, administrative Space, daycare space, fitness facilities, etc.) and provide a strategy for how the demand will be met in the Parliamentary Precinct over the interim (2032) and ultimate planning horizon (2067).

#### **2. Security**

Working closely and collaboratively with Parliamentary Partners through the Departmental Representative, the Consultant must determine security requirements and provide a strategy for how the requirements will be met in the Parliamentary Precinct over the planning horizon. The Consultant must analyze and compile information on existing conditions for all major movement systems (including pedestrians, vehicular, shuttle/tour buses, cycling and material) within and around the main and secondary study area. The Consultant must consolidate the findings into easy to understand flow diagrams. The diagrams will inform other project requirements such as material management and circulation, connectivity, movement systems and parking.

#### **3. Environmental Sustainability and Climate Change Resilience**

The Government of Canada has made environmental sustainability a key priority with the expectation that the renewal of the Parliamentary Precinct will exceed environmental sustainability standards. To this end, the Consultant must incorporate a comprehensive campus-wide sustainability strategy with ambitious, measurable and achievable short and medium-term targets into the Campus Master Plan in order to contribute to the goals set out in the Federal Sustainable Development Strategy. The Consultant's strategy must identify means to reduce Parliament's ecological footprint and achieve climate change resilience.

#### **4. Circulation, Connectivity, Movement Systems and Parking**

This is a complex and challenging project requirement. The Consultant must identify all parking and cycling requirements for the Parliamentary Precinct including for: Parliamentary Partners, Judicial Precinct, Library and Archives, PWGSC (operations/contractors), temporary parking for

## **PROJECT BRIEF**

Prime Minister /Ministers/Media, visitor parking including accessible parking, and accommodation of tour buses. The Consultant must provide a strategy to address parking demand and improve circulation and movement within and around the Precinct. The Consultant must also prepare a Parking Utilization study and a Transportation Demand Management strategy.

### **5. Material Management**

The 2006 LTVP Update identified a strategy for material management for the lands north of Wellington Street. Materials management includes but is not limited to daily deliveries varying in type and volume (food, office supplies, furniture, etc.) and waste. As part of this project, the Consultant must validate or propose an alternative material management strategy connecting Blocks 1, 2 and 3 with the lands north of Wellington Street taking into account work done to date on material management. The Consultant will explore opportunities for an integrated approach to material management with the adjacent Judicial Precinct and Library and Archives properties.

### **6. Visitor Experience**

The Visitor Experience requirement will require consultation with a broader group including the Parliamentary Partners, Department of Canadian Heritage, stakeholders, public, Indigenous communities and special interest groups (e.g. Tourism Ottawa). The Consultant must identify and incorporate new standards, guidelines, and best practices regarding visitor experience. This must include identifying designated universally accessible grounds/facilities and exploring opportunities for greater integration between the Parliamentary Precinct and surrounding areas, including opportunities to contribute to the revitalization of Sparks Street.

### **7. Urban Design – Landscape, Heritage, Public Realm, Public Art**

Taking into consideration the heritage significance, the Consultant must provide a strategy for enhancing the Precinct's public realm, making it more vibrant and inviting. The Consultant must consider urban life between buildings and how it can be emphasized and improved through the development of a Public Space Plan (to be finalized in Stage 4). The upcoming rehabilitation of many of the Parliamentary Buildings and grounds presents an opportunity to re-examine the landscape around these buildings and creation of a holistic and unified vision for all of the lands north and south of Wellington Street.

The Consultant must address key urban design and landscape architecture considerations as part of this project requirement including: the cantilevered walkway and rehabilitated "lovers' walk" (not feasible as currently proposed), grading of South Drive and plantings, Bank Street Valley rehabilitation, long-term location of the Centennial Flame, storm water management, connections to river, grading of Victoria mound and retention of public washrooms, signage and wayfinding, commemoration and site furniture such as bollards and temporary fences.

#### **Deliverables:**

RS3	Deliverable (all	Title	Format	Language
-----	------------------	-------	--------	----------

## **PROJECT BRIEF**

Project Requirement	deliverables must be provided in draft and final version)			
Accommodations				
	Report	Position Paper	Electronic	English
	Report	Gap Analysis	Electronic	English
	4 workshops	Presentations	PowerPoint	Bilingual
	Meeting Agendas/Minutes		Electronic	English
Security				
	Report	Position Paper	Electronic	English
	Report	Gap Analysis	Electronic	English
	Report	Case Studies	Electronic	English
	2 Workshops	Presentations	PowerPoint	Bilingual
	Flow-Diagrams		Electronic	English
	1 Meeting	Agenda/Minutes	Electronic	Bilingual
	Meeting Agendas/Minutes		Electronic	English
Environmental Sustainability and Climate Change Resilience				
	Report	Case Studies	Electronic	English
	Report	Gap Analysis	Electronic	English
	Report	Position Paper	Electronic	English
	4 Workshop	Presentation	PowerPoint	Bilingual
	Meeting Agendas/Minutes		Electronic	English
Circulation, Connectivity, Movement Systems and Parking				
	Report	Position Paper	Electronic	English
	Report	Gap Analysis	Electronic	English
	5 Workshops	Presentations	PowerPoint	Bilingual
	Meeting Agendas/Minutes		Electronic	English
Material Management				
	Report	Position Paper	Electronic	English
	Report	Gap Analysis	Electronic	English
	2 Workshops	Presentation	PowerPoint	Bilingual
	Meeting Agendas/Minutes		Electronic	English
Visitor Experience				
	Report	Case Studies	Electronic	English
	Report	Gap Analysis	Electronic	English
	Report	Position Paper	Electronic	English
	3 Workshops	Presentations	PowerPoint	Bilingual
	Meeting Agendas/Minutes		Electronic	English
Urban Design				
	Report	Position Paper	Electronic	English
	Report	Gap Analysis	Electronic	English
	3 workshops	Presentations	Electronic	Bilingual
	Meeting Agendas/Minutes		Electronic	English

## **PROJECT BRIEF**

---

### **RS 4 STAGE FOUR: OPTIONS DEVELOPMENT**

#### **4.1 INTENT**

The intent of this phase is to develop a minimum of three (3) design concept options for the Parliamentary Precinct integrated with the adjacent Judicial Precinct and Library and Archives Canada sites. Each option will be tested against vision, principles and guidelines and whether it meets the project requirements as set out in the previous Stage. The Consultant will present the options to the Parliamentary Partners and stakeholders for their review. The above process will lead to the selection and development of a preferred option. The Consultant must complete/finalize the required supporting studies to confirm the feasibility and viability of the options.

The Consultant must obtain written authorization from the Departmental Representative before proceeding with Stage Five.

#### **4.2 SCOPE AND ACTIVITIES**

The Consultant must perform the following tasks in this Stage:

- Review and validate the Vision and Guidelines and refine Planning and Design Principles that will become the foundation of the Campus Master Plan based on information collected in Stage 3.
- Develop a minimum of three (3) urban design/planning Options reflecting the intent of the Campus Master Plan and meeting project requirements (Phases 2 and 3). The Options must be articulated via Campus Models and supported by additional defined views and fly-throughs such as but not limited to: plan views, perspective views, rendered views, etc.)
- Identify the pros and cons for each of the Options identified.
- Conduct a transportation and servicing high-level overview analysis for the site as an input to development of the options.
- Based on the validated vision, guidelines and planning and design principles, develop a preliminary evaluation criteria to compare and evaluate the Options. The evaluation will be validated at workshops.
- Conduct three (3) separate, full-day workshops in English with:
  - PWGSC Project Team to evaluate, review and refine the Options.
  - Parliamentary Partners to evaluate, review and refine the Options.
  - Key stakeholders to evaluate, review and refine the Options
- Present the three (3) Options to NCC's Advisory Committee on Planning, Design and Realty (ACPDR).
- Further revise the Options based on the outcomes from the workshops and feedback received from the ACPDR

## **PROJECT BRIEF**

---

- Prepare and submit an Options Summary Report to be reviewed by PWGSC, the Parliamentary Partners and stakeholders for feedback. The report must be revised to reflect this feedback. The report must include among others:
  - An executive summary including recommendations requiring PWGSC approval;
  - Concept Plans of each option including description and evaluation;
  - Summary of workshops and outcomes;
  - Aerial perspectives and other graphic material for each option;
  - Analytical data for each option (e.g. area calculations, etc.);
  - Comparison of options and a recommended preferred option.
- Confirm with the PWGSC Departmental Representative one (1) preferred Option and develop two (2) Demonstration Plans (surface and underground) for said option. This must be a two-phase Demonstration Plan with the first phase illustrating the Precinct in 2032 (at the end of major renovations on Parliament Hill and the rehabilitation of Blocks 1 and 2) and the second illustrating conditions in 2067.
- Conduct two (2) full-day workshops with the PWGSC Project Team, Parliamentary Partners and stakeholders to review and discuss the two-phase Demonstration Plans. The results of the workshops are to be integrated into the Draft Campus Master Plan.
- Present the Demonstration Plan to NCC staff and the NCC Advisory Committee on Planning, Design and Realty (ACPDR).
- Organize and host a Public Information Session and prepare all bilingual materials: project information, display panels, advertisements, and flyers among others (as required).
- Finalize Preferred Option and Planning and Design Principles.
- Co-ordinate and attend regular bi-weekly project team meeting(s)/workshops.

### **SUPPORTING STUDIES TO CONFIRM FEASIBILITY OF THREE OPTIONS**

#### **Transportation Impact Study (TIS) and Transportation Demand Management Study (TDM)**

The feasibility of the three (3) Options and the Preferred Option must be demonstrated by the Consultant through a Transportation Impact Study. The Consultant must finalize the study on the basis of the Preferred Option and must evaluate the impact of the Preferred Option on municipal streets and existing transportation infrastructure as well as identify solutions (if required) including necessary upgrades.

The Consultant must prepare a Transportation Demand Management (TDM) study including a Parking Utilization, with the findings used to inform the TIS and recommendations. The TDM can be completed as part of an earlier Stage if deemed appropriate by the Consultant and agreed to by the Departmental Representative.

#### **Geotechnical Conditions Report/Slope Stability Study**

The Consultant must complete a Geotechnical/Slope Stability study to test the feasibility of the three (3) Options and Preferred Option. The Consultant must review the available existing geotechnical information, identify gaps and provide an updated report in support of the preferred option. The Consultant must identify any significant site constraints and challenges that could impact new development in the Precinct from both a feasibility and cost perspective.

## **PROJECT BRIEF**

---

### **Site Servicing Study**

The Consultant must complete a high-level analysis for the three (3) Options and finalize the study on the basis of the Preferred Option. The servicing study must confirm whether adequate servicing capacity exist within the municipal infrastructure to support both the mid (2032) and long-term build-out (2067). In the event that existing capacity is insufficient to support build-out as proposed, the Consultant must identify required upgrades to support development with a class D cost estimate cost to complete such upgrades.

### **STUDIES FOR PREFERRED OPTION ONLY**

#### **Security Strategy [Secret]**

The Consultant must use findings from Stage 3 and work closely with security stakeholders through the Department Representative, to identify an approach to achieving a secure perimeter for the Parliamentary Campus. A Risk and Threat Analysis is currently being developed and may be used to inform the broader strategy. The strategy must take into account the differences in building occupants, functions, locations, public access, threat and risk levels, risk tolerance, etc. Key security elements must be illustrated on the Demonstration Plan.

Given the sensitivities and complexities associated with security within the Parliamentary Campus, the Consultant must coordinate and lead two (2) to three (3) workshops on the proposed strategy with key stakeholders. The Consultant must use the feedback provided to revise the strategy and integrate findings to reach consensus.

#### **Landscape and Open Space Plan**

Building off previous efforts, three (3) landscape and open space options for the lands within the Parliamentary Precinct must be developed by the Consultant and coordinated with the Public Space Plan (as set out below). The options must be sensitive to the historic character of the site and address key areas of concern and unresolved issues in the 1999 and 2013 Landscape Plans including extending the boundaries of the Plan to include the whole of the Precinct (the 1999 and 2013 Plans were limited to the lands around West, Centre and East Blocks). The Consultant must conduct three (3) workshops/meetings with various stakeholders to refine the plans and arrive at a preferred concept that must be developed into a Landscape and Open Space Plan. The Consultant will support the Landscape and Open Space Plan with a site grading plan and landscape material plan. The final Plan must be coordinated with the Demonstration Plan.

#### **Public Space Plan**

The Public Space Plan will be a component of the Landscape and Open Space Plan. The Consultant must build off the Landscape and Open Space Plan and identify opportunities to enhance spaces around the Parliamentary Precinct for public use. The Public Space Plan must take a people-centric approach by first understanding the current condition and identifying a strategy for its transformation based on patterns of use to a more functional and inviting public space. The Plan must include a public art and commemoration component. The final Plan must be coordinated with the Demonstration Plan.

## **PROJECT BRIEF**

---

### **Underground Concourse Report and Plan**

Building off previous efforts, the Consultant must develop a preliminary functional program and design concepts for the underground concourse. The designs must meet the requirements and specifications of both PPB and the Parliamentary Partners. The Consultant must include a review of existing plans of all underground infrastructure, identify areas of potential conflict with the underground concourse assessing potential impacts and propose potential mitigation measures. Given the complexity, the Consultant must coordinate and lead three (3) workshops to obtain feedback from PWGSC and stakeholders to arrive at a preferred concourse option. The Consultant must prepare a summary report to support the preferred concourse option. The final Plan must be coordinated with the Demonstration Plan.

### **Universal Accessibility Plan (Exterior Grounds Only)**

The Consultant must conduct a Universal Accessibility (UA) audit of the exterior grounds of the Parliamentary Precinct. The audit must serve as the basis for identifying at least one designated UA route to all key destinations. The Consultant must consider drop-off locations for visitors on or near the site and must provide recommendations to improve access to the Ottawa River, the Rideau Canal and the West Sector of the Precinct. The Consultant's proposed route must balance accessibility goals with the heritage character of the site, and other functional/operation requirements.

The Consultant must identify changes required to existing conditions to implement the proposed route/options, including the identification of any areas where compliance cannot be achieved, associated risks, and potential mitigation measures. The Consultant must coordinate and lead two (2) workshops/meetings to present and obtain feedback on the route and conceptual design. The final option must be illustrated in Plan and be ready for implementation and coordinated with the final Demonstration Plan. The Consultant must prepare a supporting summary report.

### **Strategic Environmental Assessment Report (for Preferred Option only)**

The Consultant must undertake a Strategic Environmental Assessment (SEA) in accordance with stated federal legislation to review the likely environmental effects associated with the implementation of the Campus Master Plan (preferred option). The Consultant's report will replace the previous report "Final Report 2006 Update to the Long Term Vision and Plan for the Parliamentary Precinct: Strategic Environmental Assessment" – (2006) prepared by Jacques Whitford Engineering, Scientific, Planning and Management Consultants.

### **Additional Workshops**

Given the fluid and complex nature of the project with a large number of participants, there may be a need for additional workshops beyond those identified in this scope of services Project Brief. As such, the Consultant must include a cost per workshop as part of the price proposal. The cost must include staff time (lead and support staff), preparation of all necessary materials, facilitation and attendance of the half-day workshop and preparation of meeting minutes.



**PROJECT BRIEF****Deliverables:**

RS4	Deliverable (all deliverables must be provided in draft and final version)	Title	Format	Language
<b>Options Development</b>				
1	Three (3) Concept Plan Options/Models Support by Views as Listed Above	Concept Plans	Electronic (PWGSC to specify software format)	English
2	5 workshop presentations	Workshop (presentation tailored for each workshop)	PowerPoint	Bilingual
3	Report	Options Summary Report	Electronic	English
<b>Supporting Studies</b>				
4	Report	Transportation Impact Study	Electronic	English
5	Report	Transportation Demand Management Study	Electronic	English
6	Report	Parking Utilization Study	Electronic	English
7	Report	Geotechnical Conditions/Slope Stability	Electronic	English
8	Report	Site Servicing Study	Electronic	English
9	Report	Security Strategy	Electronic	English
10	Plan	Landscape and Open Space Plan/ Grading Plan and Landscape Material	Electronic (PWGSC to specify software format)	English
11	Plan	Public Space Plan	Electronic (PWGSC to specify software format)	English
12	Report	Underground concourse	Electronic	English
13	Plan	Underground concourse	Electronic (PWGSC to specify software format)	English
14	Report	Universal Accessibility	Electronic	English
15	Plan	Universal Accessibility	Electronic (PWGSC to specify software format)	English
16	Report	Strategic Environmental Assessment	Electronic	English
17	Meeting Agendas/Minutes		Electronic	English

## **PROJECT BRIEF**

---

### **RS 5 STAGE FIVE: DRAFT CAMPUS MASTER PLAN**

#### **5.1 INTENT**

In this stage, the Consultant must prepare and deliver a draft of the Campus Master Plan. The draft Campus Master Plan must be comprised of a written report and supported by the various Options Models and Phased Demonstration Models, along with supporting graphic materials such as the defined views listed in RS 4.

The Consultant must obtain written authorization from the Departmental Representative before proceeding with Stage Six: Final Parliamentary Campus Master Plan.

#### **5.2 SCOPE AND ACTIVITIES/ DELIVERABLES**

The Consultant must perform the following tasks in Stage 5:

- Prepare and submit a bilingual Draft Campus Master Plan that must include among others:
  - An executive summary and recommendations.
  - Development guidelines with respect to land use, location of new development, urban design, transportation and transit, servicing, environmental and open space.
  - Demonstration Models and Plan for the dual planning horizons (2032 and 2067) to include findings, results and conclusions from previous stages.
  - Aerial perspectives of the preferred option, 3-D massing model, site slides and photographs.
  - Street-level renderings illustrating the potential future state of the Precinct (a minimum of 5 renderings).
  - A Campus Information Model capturing the current state as evaluated, studied and analyzed.
- Undertake a presentation for each of the following groups on the Draft Master Plan (all presentations must be Bilingual and will take approximately ½ a day):
  - PWGSC Project Team;
  - Parliamentary Partners;
  - Stakeholders;
  - Public and Interest Group Session;
  - The Federal Heritage Buildings Review Office (FHBRO);
  - The NCC's Advisory Committee on Planning, Design & Realty (ACPDR).
- The Consultant must work closely with the Departmental Representative to prepare and refine the presentation including identifying relevant content. Draft materials must be circulated six (6) weeks prior to the presentations and need to be approved by the Departmental Representative.
- Organize and host a Public Information Session to present the Draft Campus Master Plan including bilingual materials: project information, display panels, advertisements, and flyers among others (as required).

**PROJECT BRIEF**

- Prepare and submit a bilingual summary report of comments and recommendations received during the consultation process.
- Update the Draft Campus Master Plan and all relevant materials based on the input and feedback obtained in presentation. Prepare a formal summary document of revisions.
  - Co-ordinate and attend regular project team meeting(s).

**Deliverables**

RS5	Deliverable (all deliverables must be provided in a draft and final version)	Title	Format	Language	Copies
1	Report	Draft Campus Master Plan	Electronic	English/French	
2	Plans/Visuals	Draft Phased Demonstration Plans and Supporting Visual Materials	Electronic	Bilingual	
3	5 Workshop Presentations	PowerPoint (to be tailored as required for specific audience)	PowerPoint	Bilingual	
4	Workshop Materials	Summary information, display panels, and other materials as specified by PWGSC Project Manager	Combination of Hard Copies/Electronic Materials	Bilingual	As required
5	Updated Project Plan		Electronic	English	
6	Report	Updated Campus Master Plan	Electronic	English/French	
7	Models	Campus Information Model/ Demonstration Model	Electronic	Bilingual	
8	Meeting Agendas/Minutes		Electronic	English	

**RS 6 STAGE SIX: FINAL CAMPUS MASTER PLAN****6.1 INTENT**

As part of this stage, the Consultant must finalize and obtain all necessary approvals for the Campus Master Plan. The Consultant must address all comments and recommendations received during the consultative process undertaken in Stage Five.

**6.2 SCOPE AND ACTIVITIES/ DELIVERABLES**

The Consultant must perform the following tasks as part of Stage 6:

## **PROJECT BRIEF**

- Prepare, submit and present a bilingual Final Campus Master Plan incorporating revisions from Stage Five (Draft Campus Master Plan).
- Undertake independent presentation of the Final Campus Master Plan to the following groups (all presentations must be bilingual and will take approximately ½ day):
  - PWGSC Project Team
  - Parliamentary Partners
  - Stakeholders
  - The Federal Heritage Buildings Review Office (FHBRO)
  - The NCC's Advisory Committee on Planning, Design & Realty (ACPDR)
  - NCC Board of Directors for Approval.
- The Consultant will work closely with the PWGSC Departmental Representative to prepare and refine the presentation including identifying relevant content. Draft materials must be circulated six (6) weeks prior to the presentations and need to be approved by PWGSC Project Manager.
- Organize and host a Public Information Session to present the Final Campus Master Plan.
- Provide bilingual materials for the information sessions, including: project information for distribution, display panels, advertisements, and flyers (as required).
- Update, as required, the bilingual summary report of comments and recommendations received during the consultation process.
- Update all relevant materials based on the input and feedback obtained in presentation. Prepare a formal summary document of revisions.
- Finalize the Campus Master Plan, Campus Information Model and all supporting materials (models, studies, visual and graphic materials, etc.).
- Once the PWGSC Departmental Representative provides written authorization, produce printed copies of the Final Campus Master Plan in English and French. Documents are to be printed in colour and bound. Electronic DVD/CDs are also to be provided containing the English and French versions of the Final Campus Master Plan.
- Co-ordinate and attend regular project team meeting(s). Prepare and distribute minutes/record of decisions for all meetings in this Stage of the Project.

### **Deliverables**

RS6	<b>Deliverable (all deliverables must be provided in a draft and final version)</b>	Title	Format	Language	Copies
1	Report	Final Campus Master Plan	Electronic/Web-enabled/ Hardcopy	Bilingual	100 hard copies (of a published quality i.e. hardcover or equivalent approved by Departmental

**PROJECT BRIEF**

					Representative)
2	7 Workshop Presentations	PowerPoint (to be tailored as required for specific audience)	PowerPoint	Bilingual	
3	Workshop Materials	Summary information, display panels, questionnaire and other materials as specified by PWGSC Project Manager	Combination of Hard Copies/Electronic Materials	Bilingual	As required by Departmental Representative
4	Reports/Plans/Renderings /Visuals	All Supporting Materials Updated As Required (includes all supporting studies, visual and graphic materials, etc.)	Electronic	English/French (all visuals/graphic/ Plans will be Bilingual)	
5	Models	Campus Information Model/ Demonstration Model	Electronic	Bilingual	
6	Meeting Agendas/Minutes		Electronic	English	

**RS 7 OPTION 1, IMPLEMENTATION STRATEGY & COSTING PLAN****7.1 INTENT**

The intent of this option is for the Consultant to develop an Implementation Strategy and order of magnitude costing to support the Campus Master Plan. The Implementation Strategy must be flexible to accommodate change and take advantage of new opportunities and serve as a high-level benchmark against which progress on the implementation of the Campus Master Plan can be measured. It must serve as a useful tool to help PWGSC in the development of a program of work, including additional planning services scope to support the Campus Master Plan.

**7.2 SCOPE AND ACTIVITIES/ DELIVERABLES**

The Consultant must perform the following tasks in this Stage:

- Review current documentation (ex. construction and swing space strategies, building condition reports, and existing asset 'heat map' information).
- Identify a list of projects required to achieve the end state, including capital construction projects, recapitalization projects and additional planning work (e.g. other master plans, feasibility studies, functional programming, etc.).

## **PROJECT BRIEF**

---

- For each project, provide a description and identify any interdependencies and/or synergies, enabling actions and/or additional study required to support that project.
- Identify a preliminary list of high level implementation objectives for the Campus Master Plan. Objectives should reflect the broad goals and priorities of the Campus Master Plan.
- Coordinate and lead one (1) workshop with PWGSC and stakeholders to present and discuss the findings from the tasks above.
- Based on the objectives identified, develop a list of evaluation criteria that can be used to evaluate sequencing scenarios and an evaluation methodology.
- Coordinate and lead one (1) workshop with PWGSC and stakeholders to present and discuss the evaluation criteria and methodology.
- Based on the Campus Master Plan develop at least three (3) sequencing scenarios for implementing the Plan, taking into account any multi-phase projects (e.g. underground concourse) and the need for interim facilities. The sequencing scenarios should be supported with graphic material to help illustrate project implementation.
- Undertake a preliminary evaluation of the options against the evaluation criteria.
- Coordinate and lead at least two (2) workshop sessions with PWGSC and stakeholders to present and discuss the sequencing scenarios with the intent of identifying a preferred sequencing option.
- Based on the high-level implementation objectives, the full project list, and preferred sequencing, identify a list of short-term, mid-term and long-term actions to support the implementation of the Campus Master Plan.
- Coordinate and lead one (1) workshop session with PWGSC and stakeholders to present and discuss the proposed list of short, mid and long-term actions.
- For each project, including any interim facilities required, provide a Class D cost estimate. In addition to individual project costs, a roll-up for the Campus Master Plan should be provided.
- Prepare and submit an Implementation Strategy and Cost Estimate Report which must include, but is not limited to:
  - Executive Summary
  - Introduction
  - Methodology (including for costs)
  - High-level implementation objectives
  - Project list and details
  - Sequencing scenarios and preferred sequencing option
  - Short, medium and long-term actions
  - Class D Cost estimates per project and roll-up

\*Note that the report must be prepared in such a way that the cost information (including methodology) can easily be removed from the remainder of the document.
- Revise report as required following review by PWGSC and stakeholders.
- Co-ordinate and attend regular project team meeting(s). Prepare and distribute minutes/ record of decisions for all meetings/ workshops/ information sessions in this stage of the project.

## **Deliverables**

---

**PROJECT BRIEF**

RS7	<b>Deliverable (all deliverables must be provided in a draft and final version)</b>	Title	Format	Language	Copies
1	Five (5) Workshop Presentations	Workshop on each component of Implementation Strategy (presentation tailored for each workshop)	PowerPoint	English	
2	Report	Draft and Final Implementation Strategy and Cost Estimates	Electronic/Hardcopy	Bilingual	5

**RS 8 OPTION 2, SYNOPSIS DOCUMENT****8.1 INTENT**

The Consultant must develop a Synopsis document providing a high level overview of the process and the Final Campus Master Plan and Implementation Strategy. The Synopsis document must be readable and accessible to the public both in terms of distribution and content including high-quality illustrations and graphics. Please refer to the document 'Building on a Solid Foundation' produced for the 2006 LTVP as an example.

**8.2 SCOPE AND ACTIVITIES/ DELIVERABLES**

The Consultant's Scope and Activities shall include the following:

- Produce a separate synopsis document providing a high-level overview of the Campus Master Plan and Implementation Strategy.
- The report must be tailored to the general public and must include (but is not limited to):
  - Executive Summary
  - Introduction
  - Overview of the updated Campus Master Plan
  - Overview of the Implementation Strategy
  - High-quality graphics/diagrams to support text.
- Submit a draft report to PWGSC for review and comments, revising as required.
- Submit a final report to PWGSC.

**Deliverables**

RS8	Deliverable Type	Title	Format	Language	Copies
1	Report	Draft Synopsis Document	Electronic	Bilingual	5
2	Report	Final Synopsis Document	Electronic/Web-enabled/Hard Copy	Bilingual	100

## **PROJECT BRIEF**

---

### **STREAM 2 REQUIRED SERVICES**

#### **1.0 INTRODUCTION**

Consultant shall provide all the required services listed in this Stream 2 Services Brief either as part of their in-house expertise and/or a combination of in-house resources and sub-consultants/specialists. Specific services will be identified in each Task Authorization.

#### **2.0 SCOPE OF SERVICES**

Task Authorizations may include any or all of the following Basic, Additional and/or Specialized Services. Specific services will be identified and customized to suit particular requirements in each Task Authorization.

##### **RS 2.1 BASIC SERVICES**

###### **A) PRE-DESIGN/DESIGN STAGE SERVICES**

- RS 2.1.1 Analysis of Project Scope of Work
- RS 2.1.2 Design Concept (Schematic Design)
- RS 2.1.3 Design Development

###### **B) CONSTRUCTION STAGE SERVICES**

- RS 2.1.4 Construction Documents, Pre-Tender Construction Cost Estimate and Project Schedule
- RS 2.1.5 Tender Call, Bid Evaluation and Construction Contract Award
- RS 2.1.6 Construction and Contract Administration
- RS 2.1.7 Commissioning
- RS 2.1.8 Post-Construction Warranty Review

##### **RS 2.2 ADDITIONAL SERVICES**

- RS 2.2.1 Investigations and Reports
- RS 2.2.2 Functional Programming
- RS 2.2.3 Feasibility Studies
- RS 2.2.4 Interior Design
- RS 2.2.5 Accessibility audits
- RS 2.2.6 Sustainability Reports
- RS 2.2.7 Resident Services During Construction
- RS 2.2.8 Estimating and Cost Planning
- RS 2.2.9 Risk Management
- RS 2.2.10 Closure Report
- RS 2.2.11 As-built documentation and measured drawings



## **PROJECT BRIEF**

---

RS 2.2.12	Materials and Systems Testing
RS 2.2.13	Technical Compliance / Peer Reviews / Advisory Services
RS 2.2.14	Other Additional Services
<b>RS 2.3</b>	<b>SPECIALIZED SERVICES</b>
RS 2.3.1	Heritage Conservation Specialist
RS 2.3.2	Landscape Architectural Design
RS 2.3.3	Geotechnical Engineering
RS 2.3.4	Civil Engineering
RS 2.3.5	Building Envelope Specialist
RS 2.3.6	Sustainable Development Specialist
RS 2.3.7	Smart/Intelligent Building Specialist
RS 2.3.8	Climate Change Vulnerability and Risk Assessment Specialist
RS 2.3.9	Green/Clean Technology Specialist
RS 2.3.10	IT / Telecommunications Specialist
RS 2.3.11	Building Code Specialist
RS 2.3.12	Multi-media Specialist
RS 2.3.13	Acoustic Specialist
RS 2.3.14	Security Specialist
RS 2.3.15	Scheduling Specialist
RS 2.3.16	Food Service / Kitchen Consultant
RS 2.3.17	Vertical Transportation Specialist
RS 2.3.18	Wayfinding and signage specialist
RS 2.3.19	Roofing Specialist
RS 2.3.20	Traffic Specialist
RS 2.3.21	Building Information Modelling (BIM) Specialist
RS 2.3.22	Lighting Specialist
RS 2.3.23	Hardware Design Specialist
RS 2.3.24	Move Coordination Specialist
RS 2.3.25	Indigenous Affairs Specialist
RS 2.3.26	Blast Engineering Specialist
RS 2.3.27	Urban Planning and Design Specialist
RS 2.3.28	Public Consultation Specialist
RS 2.3.29	Industrial Engineering/Material Handling Logistics Specialist
RS 2.3.30	Other Specialized Services

### **RS 2.1 BASIC SERVICES**

Basic services described below are considered to be the traditional architectural design services (full/integrated design service) provided by the Consultant and the services provided by the basic engineering disciplines: structural, mechanical and electrical, with the specification writer and cost estimator as sub-consultants and/or in-house resources.

## **PROJECT BRIEF**

---

The Consultant shall:

1. Manage and coordinate the design and administration of the project and also ensure that all members of the Stream 2 Consultant Team are properly informed of, and fulfill, their responsibilities for the Basic Services.
2. Throughout all stages of the project, coordinate and assume responsibility for the services of any sub-consultants and specialists retained by the Consultant.
3. Ensure clear, accurate and ongoing communication of concept, design intent, 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.
4. Ensure Sub-Consultants provide site inspection services to meet municipal and building code obligations, prepare field review reports and issue correspondence in a timely fashion, respond to the requirements of the authorities having jurisdiction, submit a copy of all correspondence with authorities having jurisdiction to the Departmental Representative, and attend all required meetings.
5. Prepare a documentation and reporting structure for the coordination of consultants in other disciplines to include minutes, change orders, site instructions, shop drawing log and other items of the design process to facilitate project completion, commissioning and close-out.

The following Basic Services are considered part of the full/integrated design service of a project. However, these services may be reduced and/or augmented with Additional Services or Specialized Services, as required and as specified in individual Task Authorizations.

Basic Services are grouped into two main categories: Pre-Design/Design Stage Services and Construction Stage Services. As mentioned previously, it is expected that required Consultant services will be largely focused on the provision of Pre-Design/Design Services; however, services during the Construction Stage may be required to a lesser extent to support continued implementation of the LTVP, as updated by the Campus Master Plan.

## **PROJECT BRIEF**

---

### **A) PRE-DESIGN/DESIGN STAGE SERVICES**

#### **RS 2.1.1 ANALYSIS OF PROJECT SCOPE OF WORK**

##### ***2.1.1.1 INTENT***

The purpose of this stage is to ensure the Consultant has reviewed and integrated all the project requirements, identified and evaluated conflicts or problems, provided alternative strategies, presented and received approval on a Project scope, delivery process, schedule and cost estimate required to deliver a cohesive quality project. This approved deliverable will become the Project Scope of Services and will be utilized throughout the project to guide the delivery.

##### ***2.1.1.2 SCOPE AND ACTIVITIES***

The Consultant shall:

1. Upon receiving an Issued Task Authorization from the Departmental Representative, analyze the Task Authorization requirements and advise the Departmental Representative of any noted problems or the need for more information, clarification or direction. If required, the Departmental Representative will provide the Consultant with a revised Issued Task Authorization.
2. Visit the site and/or buildings and verify the availability and capacity of services needed for the project.
3. Perform measurements, surveys and obtain local information applicable to the design, during the site visit. This includes verifying or preparing as built records as necessary.
4. Attend project start up meeting.
5. Analyze the project requirements including but not limited to the space analysis requirements and functional program (when available).
6. Review all available existing material related to the project. **(Please note: Subject to applicable security requirements, the Consultant will be given access to existing plans, survey notes, design notes, specifications or reports that will aid in the work. All such documents must be returned to the Departmental Representative at Task Authorization Close-out.)**
7. Review the proposed project schedule for verification that all milestone dates are achievable.
8. Review the cost plan/budget for verification that the costs are realistic and achievable.
9. Identify and verify all authorities having jurisdiction over the project.
10. Identify the codes, regulations and standards that apply.
11. Establish a policy for project to minimize environmental impacts consistent with the project objectives and economic constraints.
12. Review potential for environmental impacts and application of the Canadian Environmental Assessment (CEA) Act.

## **PROJECT BRIEF**

---

13. Upon receipt of an Issued Task Authorization, identify additional and/or specialized services that may be required to proceed with the project but are not included in the required services of the specific Task Authorization. Advise and recommend to the Departmental Representative the list of proposed services such as soil testing, equipment testing, material testing, geotechnical analysis or any other services that may impact the design, quality, budget or schedule of the project. If in agreement with the proposed additional services, the Departmental Representative will provide a revised Issued Task Authorization to the Consultant.

### ***2.1.1.3 DELIVERABLES***

The Consultant shall:

1. Provide a comprehensive summary of the project requirements/program demonstrating understanding of the scope of services including:
  - a. report on existing base building system elements including their condition, deficiencies and life expectancy.
  - b. confirmed or adjusted project cost and time plans.
  - c. written identification of the problems, conflicts or other perceived information/clarifying assumptions for the acknowledgment of the Departmental Representative.

## **PROJECT BRIEF**

---

### **RS 2.1.2 DESIGN CONCEPT (SCHEMATIC DESIGN)**

#### ***2.1.2.1 INTENT***

The purpose of this stage is to translate the project requirements into space parameters, by exploring design options and analyzing them against priorities and program objectives previously identified. Out of this process, one option will be recommended to proceed to Design Development.

#### ***2.1.2.2 SCOPE AND ACTIVITIES***

The Consultant shall:

1. Present three (3) alternative design options (unless otherwise specified in the Task Authorization) which are viable and have potential for development.
2. Analyze each solution with regard to the project goals including cost and schedule.
3. Submit to the Departmental Representative, design concept documents for the three alternative design options in sufficient detail to illustrate the design concept and to demonstrate compliance with the Project requirements.
4. For each design option, submit a preliminary Class C Construction Cost Estimate, Cost Plan and Project Schedule to confirm the feasibility of the Project.
5. Provide copies of all design concept documents in the type and number specified in PA 2.4.
6. Provide drawings that include analytical diagrams, schematic bubble diagrams, plans, elevations, and sections, room names and sizes. Perspective sketches may be requested;
7. Provide option analysis, complete with life cycle cost analysis.
8. Meet and correspond with authorities having jurisdiction and obtain written approvals when required.
9. Recommend a single preferred Conceptual Option for Design Development consideration.

#### ***2.1.2.3 DELIVERABLES***

The Consultant shall provide the following for the design options:

1. Design Concept/Schematic Drawings
2. Description of the options with recommendation of preferred solution
3. Class 'C' Estimates
4. Report on deviation from schedule and recommend corrective measures or updated time line.

## **PROJECT BRIEF**

---

### ***2.1.2.4 DELIVERABLES - DETAILS***

The Consultant shall provide the following for all design options:

#### **2.1.2.4.1 Architectural**

1. Site plan showing proposed building outlines, orientation, main accesses and traffic patterns.
2. Schematic building plans of alternatives showing relative disposition of main accommodation areas, circulation patterns, numbers of floors, etc.
3. Sketch elevations and sections indicating the basic design approach and aesthetic philosophy.
4. Sketch perspectives or massing studies.
5. Outside gross building areas and summary of main accommodation areas required and proposed.
6. Horizontal and Vertical space relationships.

#### **2.1.2.4.2 Structural**

1. Schematic drawings showing the main structural components of the building for the various options considered including schematic plans, elevations and sections. Concept seismic resisting systems proposed are to be incorporated in the schematic drawings. Provide a schematic design brief outlining key structural design information including: type of structure, design loads, seismic design parameters, geotechnical parameters, structural constraints, etc.

#### **2.1.2.4.3 Mechanical**

1. The concept submission shall include a description of specific mechanical requirements and function for each area (room) in the building. Incorporate in the submission a schedule of requirements listing all rooms and identify the mechanical building services to be provided.
2. Explain in the concept submission the manner in which the proposed mechanical systems correlate with user requirements.
3. Identify the volume of outdoor air to be supplied per person.
4. Identify the delivery rate of supply air to occupied spaces.
5. Identify whether full time operating staff will be needed for operating any of the mechanical equipment. Differentiate between staff that is needed by code requirements versus that staff which is needed because of the nature and size of the facility.
6. Identify location of entry point into the building of all mechanical services into the building.

## **PROJECT BRIEF**

---

7. Identify in square meters the area to be provided for mechanical rooms, and then identify what percentage of total building area this represents. Identify location of mechanical spaces in the building.
8. Analysis of alternative mechanical schemes at the conceptual design stage shall reveal energy consumption of building systems, operating and maintenance costs on a month by month basis for a time span of one year. Accordingly the estimated energy, operating and maintenance costs shall be used in life cycle cost analyses in order to determine the most beneficial mechanical systems alternative. Life cycle cost analyses shall be based on a projected building life of 25 years.
9. Carry out energy analysis on system alternatives.
10. Establish an energy budget for the building and compare it to energy consumption of other similar buildings. Total energy consumed in the building shall be expressed in kWh/sq m.
11. Submit a complete energy analysis as described in this section in the paragraphs under the heading Building Loads and Energy Analysis.
12. Identify the type of boilers to be used (i.e. cast iron sectional, fire tube, etc.) and provide an economic and technical explanation of the reason for the type of boiler to be used.
13. List of non-Canadian products and materials proposed for the project with written justification.

### **2.1.2.4.4 Electrical**

1. Proposed basic electrical systems of significance to the early design.
2. Site plan showing location of service entrances.
3. Distribution diagram showing single line diagrams to distribution centres.
4. Floor plans complete with locations of major electrical equipment and distribution centres.
5. Lighting layouts.
6. Power outlets.
7. Ceiling distribution systems for lighting, power and telecommunications.
8. List of standard PWGSC details to be utilized.
9. Telephone rooms, conduits and telecommunication cable systems requirements and layout.
10. Provide an electrical design synopsis, describing the electrical work in sufficient detail for assessment and approval by the Department. Include feasibility and economic studies of proposed systems complete with cost figures and loads.
11. List of non-Canadian products and materials proposed for the project with written justification.

### **2.1.2.4.5 Commissioning**

1. Define Commissioning Requirements.

## **PROJECT BRIEF**

---

2. Identify in square metres the area to be provided to maintenance personnel, including storage and workshops for mechanical, electrical and housekeeping.
3. Define project archives.

### **2.1.2.4.6 Sustainable Development**

1. Design and evaluate Design Options exploring positive environment strategies.
2. Environmental Assessment and the CEA Act Screening Report (to include comment on all the design options)

### **RS 2.1.3 DESIGN DEVELOPMENT**

#### ***2.1.3.1 INTENT***

The purpose of this stage is to further develop one of the options presented at the Design Concept stage. The Design Development documents consist of drawings and other documents to describe the size and character of the entire project as to architectural, structural, mechanical and electrical systems, materials and such other elements as may be appropriate.

#### ***2.1.3.2 SCOPE AND ACTIVITIES***

The Consultant shall:

1. Obtain written approval from the Departmental Representative for development of one of the proposed Design Concept options.
2. If any alterations are demanded, document all required changes, analyze the impact on all project components, and resubmit for approval if required.
3. Expand and clarify the Concept Design intent for each design discipline.
4. Continue to review all applicable statutes, regulations, standards, guidelines, codes and by-laws in relation to the design of the project.
5. Present the design to the authorities having jurisdiction where required.
6. Refine the approved preferred Conceptual Design Option to a level of detail which will facilitate Class B cost estimates, design, Code non-conformances review and discussions with the Client.
7. Submit to the Departmental Representative, design development documents in sufficient detail to define the size, intent and character of the entire Project.
8. Analyze the constructability of the project and advise on the construction process and duration.
9. Present the design materials to the client, design review or other committees as indicated by the Departmental Representative.
10. Based on all material available at the time, prepare a milestone schedule for the consideration with special attention to the impact on tenants.



## **PROJECT BRIEF**

---

11. Provide a list and draft specification sections of all NMS sections to be used. Submit outline specifications for all systems and principle components and equipment. Provide in the outline specifications, manufacturers literature about principal equipment and system components proposed for use in this project.
12. Submit an updated Construction Cost Estimate based on the design development documents, and an updated Cost Plan and Project Schedule.
13. Provide copies of all design development documents in the type and number specified in PA 2.4.

### ***2.1.3.3 DELIVERABLES***

The Consultant shall provide the following:

1. Floor plans including all disciplines showing all floor elements and services to detail necessary to make all design decisions and to substantially estimate the cost of the project
2. Three (3) building sections (unless otherwise specified in Task Authorization)
3. Demolition Plans
4. Architectural, structural, engineering, millwork and finishing details to determine choice of materials and finishes
5. Reflected ceiling plans
6. Elevations
7. Site and building models as required
8. Finished and colour schemes
9. Outline specifications for all systems and principle components or equipment
10. Class 'B' cost estimate
11. Preliminary construction schedule including long term delivery items
12. Fire Protection Engineers Report including requirements, strategies or interventions for protection of the building and its occupants
13. Project dossier detailing the basic assumptions of the project and the justifications for all major decisions
14. Commissioning Plan

### ***2.1.3.4 DELIVERABLES - DETAILS***

The deliverables from the Consultant shall include the following:

#### **2.1.3.4.1 Architectural Drawings**

1. Site Plan showing the building(s) and existing or proposed environmental items including traffic pattern, parking, grading, and landscaping.

## **PROJECT BRIEF**

---

2. Cross sections through the site to show the relationship of buildings to proposed ground elevations and planting.
3. Floor Plans of each floor showing all accommodation required, including all necessary circulation areas, stairs, elevators, and ancillary spaces anticipated for service use. Indicate building grids, modules, and key dimensions.
4. Furniture and Equipment plans.
5. Elevations of all exterior building facades showing all doors and windows accurately sized and projected from the floor plans and sections. Indicate clear floor and ceiling levels and any concealed roof levels.
6. Cross Sections through the building(s) to show floor levels, room heights, inner corridor or court elevations, etc.
7. Detail sections of walls or special design features requiring illustration and explanation of this stage, including fireproofing methods.
8. Finish and colour schemes.

### **2.1.3.4.2 Structural Drawings**

1. Drawings indicating the proposed structural framing system, type of foundation, structural materials, cladding details and other significant or unusual details proposed. Include a copy of the site report on which the design is based.

### **2.1.3.4.3 Mechanical Drawings**

1. Site Plan showing service entrances for water supply, sanitary and storm drains and connections to public utility services, including all key invert elevations.
2. Drawings showing preliminary sizing of ventilation, cooling and heating systems showing locations, and all major equipment layouts in mechanical rooms.
3. Drawings of plumbing system, showing routing and sizing of major lines and location of pumping and other equipment where required.
4. Drawings of the fire protection systems showing major components.
5. Produce preliminary designs based on the approved concept. Update the energy analysis and energy budget established at the concept design stage.
6. Update the schedule of requirements.
7. Provide information of all internal and external energy loads in sufficient detail to determine the compatibility of the proposal with existing services, approved concept and energy budget.
8. Analysis of selected equipment and plant with schematics and calculations sufficient to justify the economy of the selected systems.
9. Describe the mechanical systems to be provided and the components of each system. Describe the perceived operation of the mechanical systems.
10. Explain what operating staff will be needed to operate the building systems and the expected functions of the operation staff.

## **PROJECT BRIEF**

---

11. Describe the building systems control architecture. Provide preliminary Energy Monitoring and Control System (EMCS) network architecture, mechanical control schematics, and sequence of operation.
12. Explain what acoustical and sound control measures are to be included in the design.

### **2.1.3.4.4 Electrical drawings**

Provide drawings showing advanced development of the following:

1. Single line diagram of the power circuits with their metering and protection, including:
  - a. Complete rating of equipment.
  - b. Ratios and connections of CT's and PT's.
  - c. Description of relays when used.
  - d. Maximum short circuit levels on which design is based.
  - e. Identification and size of services.
  - f. Connected load and estimated maximum demand on each load centre.
2. Electrical plans with:
  - a. Floor elevations and room identification.
  - b. Legend of all symbols used.
  - c. Circuit numbers at outlets and control switching identified.
  - d. All conduit and wire sizes except for minimum sizes which should be given in the specification.
  - e. A panel schedule with loadings for each panel.
  - f. Telephone conduits system layout for ceiling/floor distribution.
3. Riser diagrams for lighting, power, telephone and telecommunication cable systems, fire alarm and other systems.
4. Elementary control diagrams for each system.
5. Schedule for motor and controls.
6. Complete lighting layout and fixture schedule clearly indicating methods of circuiting, switching and fixture mounting.
7. Electric heating layout and schedule.
8. Provide the following data:
  - a. Total connected load.
  - b. Maximum demand and diversity factors.
  - c. Sizing of standby load.
  - d. Short-circuit requirements and calculations showing the ratings of equipment used.

### **2.1.3.4.5 Commissioning**

1. Define operational requirements.
2. Define Commissioning Requirements.

## **PROJECT BRIEF**

---

3. Prepare a Commissioning Brief describing major commissioning activities for mechanical, electrical and integrated system testing.
4. Define and establish project specific archives

## **PROJECT BRIEF**

---

### **B) CONSTRUCTION STAGE SERVICES**

#### **RS 2.1.4 CONSTRUCTION DOCUMENTS, PRE-TENDER CONSTRUCTION COST ESTIMATE AND PROJECT SCHEDULE**

##### ***2.1.4.1 INTENT***

The purpose of this stage is to prepare drawings and specifications setting forth in detail the requirements for the construction and final cost estimate of the project.

- 33% indicates technical 33% completeness of all working documents
- 50% indicates substantial technical development of the project – advanced architectural and engineering plans, details, schedules and specifications
- 66% indicates substantial technical development of the project - well advanced architectural and engineering plans, details, schedules and specifications
- 99% is the submission of complete Construction Documents ready for tender call and submission to local authorities for pre-permit purposes
- Develop project-specific Systems Operations Manual (SOM)
- Final Submission incorporates all revisions required in the 99% version and is intended to provide PWGSC with complete construction documents for tender call
- Construction documents must follow the document *Doing Business with PWGSC* in Appendix D.

##### ***2.1.4.2 SCOPE AND ACTIVITIES***

1. The Consultant shall, after acceptance of the Design Development documents by the Departmental Representative and after receiving a written directive to proceed, prepare and:
  - a. submit for review to the Departmental Representative construction documents detailing the requirements for the construction of the Project at each stage of completion as specified in the project Task Authorization;
  - b. submit an updated Cost Plan including a Construction Cost Estimate and Project Schedule at each specified stage of completion; and
  - c. provide copies of all construction documents submitted, in the type and number specified in PA 2.4.
2. The Consultant shall prepare for tender call purposes and submit to the Departmental Representative for acceptance a final Class A Construction Cost Estimate based on the approved construction documents, together with a breakdown thereof, and an updated

## **PROJECT BRIEF**

---

Project Schedule.

3. Activities are similar at all stages specified in the project Task Authorization (33%, 50%, 66%, 99%, final) and the completeness of the documentation should reflect the stage of each submission.
  - a. Obtain Departmental Representative's approval for at each submission
  - b. Confirm format of drawings and specifications
  - c. Clarify special procedures (i.e. phased construction)
  - d. Submit drawings and specifications at the required stages
  - e. Provide written response to all review comments and incorporate them into the Construction Documents where required.
  - f. Advise as to the progress of cost estimates and submit updated cost estimates as the project develops
  - g. Update the project schedule
  - h. Prepare a final Class 'A' estimate. Review and approve materials and construction processes specifications to meet sustainable development objectives.
  - i. Provide copies of all construction and pre-bid/pre-tender documents in the type and number specified in PA 2.4.

### ***2.1.4.3 SCOPE AND ACTIVITIES - DETAILS***

#### **2.1.4.3.1 Technical and Production Meetings**

1. The production of construction documents will be reviewed during the meetings arranged by the Departmental Representative and Consultant.
2. Representatives from the Client and PWGSC support staff will be present as arranged by the Departmental Representative.
3. Consultant shall ensure that his/her staff and the sub-consultant representatives attend the technical and production meetings as required.
4. Consultant shall arrange for all necessary data, progress prints, etc.
5. Consultant shall prepare minutes of the meetings and distribute copies to all participants.

#### **2.1.4.3.2 Progress Review**

1. As work progresses on construction drawings, submit drawings, schedules, details, pertinent design data and updated Cost Plan and Project Schedule as required.
  1. Mechanical:
    - a. Flow diagrams, system layouts, equipment selections and sizes, floor plan layouts showing major equipment.
    - b. All major ductwork sized and shown on drawings including layout of all

## **PROJECT BRIEF**

---

- major mechanical and transformer rooms.
  - c. EMCS network architecture, mechanical control schematics, sequence of operation for each mechanical system, electrical control schematics, DDC input/output point schedules.
  - d. Commissioning Plan in accordance with PWGSC Commissioning Guidelines: CP.3 - Guide to the development of the Commissioning Plan, latest edition.
  - e. Update the building load calculation, energy analysis and energy budget.
  - f. Submit at the stipulated progress submission all calculations for mechanical
1. Design and equipment selection. These calculations shall be bound (3-ring binder) and indexed.
  2. Calculations submitted shall not necessarily be reviewed. They are required for record purposes and in certain instances to assist in the understanding and interpretation of designs. Calculations shall be submitted in a format that is legible, neat and easily understandable.
  3. Specifications and an index of specifications are to follow the requirements of *Doing Business with PWGSC* in Appendix D.

### ***2.1.4.4 DELIVERABLES***

Deliverables are similar at all stages and the completeness of the project development should reflect the stage of a submission. For example:

1. 99% Submission:
  - a. Complete specification and working drawings.
  - b. Room Finish Schedules, Door and Frame Schedules, Door Hardware Schedule
  - c. Commissioning Plan and Systems Operations Manual
  - d. One copy of the complete colour schedules, including textures, sheens, super-graphics, colour chips and material samples.
  - e. One copy of site information, soil investigating report, borehole logs, etc.
  - f. One copy of support data, studies, calculations, etc., required by PWGSC for final checking and record.
  - g. One copy of updated Cost Plan and Project Schedule
2. Final Submission: This submission incorporates all revisions required by the review of the 99% submission. Provide the following:
  - a. Complete set of originals of the working drawings.
  - b. Complete sets of original specifications.

## **PROJECT BRIEF**

---

- c. Room Finish Schedules, Door and Frame Schedules, Door Hardware Schedule
  - d. Class 'A' cost estimate
  - e. Complete Commissioning Plan
  - f. Complete Systems Operations Manual
  - g. Complete set of original Colour Schedule and 2 copies of colour board samples.
  - h. One set of soil investigating report with amendments if any.
  - i. One set of Designated Substances Report (DSR).
3. Inspection Authorities Submission
- a. Submit and obtain approval on plans and specifications required by Inspection Authorities before tender call.



## **PROJECT BRIEF**

---

### **RS 2.1.5 TENDER CALL, BID EVALUATION AND CONSTRUCTION CONTRACT AWARD**

#### ***2.1.5.1 INTENT***

The purpose of this stage is to obtain and evaluate bids from qualified contractors to construct the project as per the Tender Documents. To award the construction contract according to government regulations.

#### ***2.1.5.2 SCOPE AND ACTIVITIES***

##### **General**

The Consultant shall:

1. The Consultant shall, after acceptance of the final submission of the construction documents by the Departmental Representative, provide one (1) complete set of the approved working drawings signed, sealed and dated by a Professional, licensed in the Province of Ontario, for each of their respective disciplines: Licensed Architect in Ontario (OAA member), Professional Engineer (P. Eng) for engineering discipline, Licensed Interior Designer (ARIDO member), digitally, suitable for reproduction, and two (2) sets of the approved specifications, one set to be suitable for reproduction and the other set to be properly bound and covered.
2. Attend tenderers briefing meeting(s)
3. Prepare addenda based on questions arising in such meetings for issue by the Departmental Representative
4. Provide the Departmental Representative with all information required by tenderers to fully interpret the Construction Documents. The Departmental Representative will issue the addenda to all participants.
5. Keep full notes of all inquiries during the bidding period and submit same to Departmental Representative at the end, for PWGSC records.
6. Assist in tender evaluation by providing advice on the following:
  - a. The completeness of tender documents in all respects.
  - b. The technical aspects of the tenders.
  - c. The effect of alternatives and qualifications which may have been included in the tender.
  - d. The tenderers capability to undertake the full scope of work.
  - e. The availability of adequate equipment to carry out the work.
  - f. Provide information to support price negotiations.
7. If PWGSC decides to re-tender the project, provide advice and assistance to the Departmental Representative.

## **PROJECT BRIEF**

---

8. Revise and amend, at your cost, the construction documents to bring the cost of the work within the limits stipulated.
9. Examine and report on any cost and schedule impact created by the issue of tender / contract addenda.
10. Provide copies of all documents in the type and number specified in PA 2.4.

### ***2.1.5.3 DELIVERABLES***

The Consultant shall provide the following:

1. Originals of drawings and specifications
2. Electronic copies of drawings and specifications.
3. Addenda as required
4. Changes to the documents, if re-tendering is necessary
5. Updated cost estimate and/or schedule
6. Issued for construction documents (drawings and specifications), if applicable

## **PROJECT BRIEF**

---

### **RS 2.1.6 CONSTRUCTION AND CONTRACT ADMINISTRATION**

#### ***2.1.6.1 INTENT***

The purpose of this stage is to implement the project in compliance with the Contract Documents and to direct and monitor all necessary or requested changes to the scope of work during construction.

#### ***2.1.6.2 SCOPE AND ACTIVITIES***

The Consultant shall:

1. During the implementation of the project, act on PWGSC's behalf to the extent provided in this document;
2. Carry out the review of the work to determine if the work is in conformity with the Contract Documents and the municipality and building code requirements; frequency of site visits to be determined for each project in the Task Authorization;
3. Keep PWGSC informed of the progress and quality of the work and report any defects or deficiencies in the work observed during the course of the site review; take digital photographs of work in progress and of any defects; submit regular field review reports;
4. Ensure compliance with Commissioning Plan, update plan as necessary;
5. Determine the amounts owing to the Contractor based on the progress of the work and certify payments to the Contractor;
6. Act as interpreter of the requirements of the Contract Documents;
7. Provide cost advice during construction;
8. Advise the Departmental Representative of all potential changes to scope for the duration of the implementation;
9. Review the Contractor's submittals;
10. Prepare and justify change orders for issue by the Departmental Representative;
11. Indicate any changes or material/equipment substitutions on Record Documents;
12. During the twelve (12) month warranty period investigate all defects and alleged defects and issue the instructions to the Contractor;
13. Prepare and post Systems Operating Instructions;
14. Finalize Systems Operations Manual;
15. Conduct a final warranty review.

#### **2.1.6.3 SCOPE AND ACTIVITIES - DETAILS**

The Consultant shall:

##### **2.1.6.3.1 Construction Meetings**

1. Immediately after contract award, arrange a briefing meeting with the Contractor and the Departmental Representative. Prepare minutes of the meeting and distribute copies

## **PROJECT BRIEF**

---

to all participants and to other persons agreed upon with the Departmental Representative.

2. Call site meetings on a bi-weekly basis (unless otherwise specified in the Task Authorization), commencing with the construction briefing meeting. The meetings should include the job superintendent, Departmental Representative, Inspector of Construction, main sub-contractors, affected sub-consultants and PWGSC representatives as necessary. Prepare minutes of the meeting and distribute copies to all participants. The Departmental Representative may invite the Client/Users to attend any of these meetings.
3. Advise the Departmental Representative of the dates and times of the proposed meetings;
4. Attend all such meetings; and
5. Maintain a record of the proceedings of such meetings and provide the Departmental Representative with a copy thereof within a maximum of five (5) working days of the meeting.

### **2.1.6.3.2 Project and Construction Schedule**

1. As soon as practical after the award of the Construction Contract, request from the Contractor a detailed construction schedule, and, after review for conformity with the Project Schedule and implementation of necessary adjustments, forward two (2) annotated, signed "Reviewed and Accepted" and dated copies of the Consultant-accepted construction schedule to the Departmental Representative;
2. Obtain Construction Schedule with detailed commissioning component shown separately, as soon as possible after contract award and ensure proper distribution.
3. Monitor the approved construction schedule, take necessary steps to ensure that the schedule is maintained and submit a detailed report to the Department concerning any delays.
4. Report to the Departmental Representative the progress of the construction.
5. Notify the Departmental Representative of any known and anticipated delays which may affect the completion date of the Project, and keep accurate records of the causes and duration of delays. Make every effort to assist the Contractor to avoid delays.

### **2.1.6.3.3 Time Extensions**

1. The Departmental Representative shall evaluate all requests from the Contractor for time extensions, and shall issue directions to the Contractor and the Consultant. Only the Departmental Representative may approve any request for Time Extensions. Approval will be issued in writing by the Departmental Representative.

### **2.1.6.3.4 Cost Breakdown**

1. Obtain from the Contractor detailed cost breakdown on standard PWGSC form and submit to the Departmental Representative with the first Progress Claim.

### **2.1.6.3.5 Changes to List of Sub-Contractors**

1. The Contractor is required to use the sub-contractors listed on the tender form unless a change is authorized by the Department. Changes are only considered when they

## **PROJECT BRIEF**

---

involve no increase in cost. Review all requests for changes of sub-contractors, and submit recommendations to the Departmental Representative.

2. When sub-contractors have not been listed on the Tender Form, obtain the list from Contractors not later than 10 working days after date of award.

### **2.1.6.3.6 Labour Requirements**

1. The Contractor is bound by the Contract to maintain competent and suitable workmen on the project and to comply with the Canada Department of Labour - Labour Conditions. Inform the Department of any labour situations that appear to require corrective action by the Department.
2. Ensure that a copy of the Labour Conditions for the Contract is posted in a conspicuous place on site.

### **2.1.6.3.7 Bylaw Compliance**

1. Ensure that construction complies with applicable bylaws and regulations.
2. Refer matters pertaining to the Department of Labour to the Departmental Representative.

### **2.1.6.3.8 Construction Safety**

1. All construction projects that are occupied by federal employees during construction are subject to the Canada Occupational Safety and Health Act and Regulations as administered by Health and Welfare Canada.
2. In addition to the above, the Contractor must comply with the provincial and municipal safety laws and regulations, and with any instructions issued by the officers of these authorities having jurisdiction relating to construction safety.
3. Ensure the Contractor is mandated to provide all required coordination, isolation, protection and reinstatement of the fire protection and suppression systems throughout construction. Notify the Property Manager each time the fire protection and suppression systems are bypassed and advise of estimated reinstatement time. Ensure the Contractor is mandate to provide Watchman Service.

### **2.1.6.3.9 Site Visits**

1. Provide non-resident construction review services to meet municipal and building code obligations and ensure compliance with contract documents.
2. Provide services of qualified personnel who are fully knowledgeable with technical and administrative requirements of project.
3. Establish a written understanding with contractors as to what stages or aspect of the work are to be inspected prior to being covered up.
4. Assess quality of work and identify in writing to the Contractor and to the Department all defects and deficiencies observed at time of such inspections.
5. Inspect materials and prefabricated assemblies and components at their source or assembly plant, as necessary for the progress of the project.
6. Any directions, clarifications or deficiency list shall be issued in writing to PWGSC.
7. Record and report to the Departmental Representative on the progress, non-

## **PROJECT BRIEF**

---

conformities and deficiencies observed during each site visit, and provide the Contractor with written progress reports and lists of deficiencies observed; take digital photographs of the progress of the work and work to be rectified; include photographs into the reports; and recommend the action to be taken.

8. Assist PWGSC in ensuring prompt implementation by the Contractor of all remedial actions which have been accepted by the Departmental Representative in writing, and issue a written confirmation of their completion to the Departmental Representative and to the Contractor.

### **2.1.6.3.10 Clarifications and Interpretation**

1. Provide clarification and interpretation of the construction documents or site conditions, in written or graphic form, within five (5) working days or, if a longer timeframe is required, in accordance with a schedule pre-approved by the Departmental Representative, to the Contractor with a copy to the Departmental Representative, for the proper execution and progress of the construction as and when necessary.

### **2.1.6.3.11 Progress Reports**

1. Report to the Departmental Representative regularly on the progress of the work. Submit weekly reports.

### **2.1.6.3.12 Work Measurement**

1. If work is based on unit prices, measure and record the quantities for verification of monthly progress claims and the Final Certificate of Measurement.
2. When Contemplated Change Notice is to be issued based on Unit Prices, keep accurate account of the work. Record dimensions and quantities.

### **2.1.6.3.13 Detail Drawings**

1. Provide for the Departmental Representative's information any additional detail drawings as and when required to properly clarify or interpret the contract documents.

### **2.1.6.3.14 Shop Drawings**

1. Establish and implement a shop drawing handling/distribution protocol acceptable to the Project Team. Verify the number of copies of shop drawings required. Consider additional copies for Client's review.
2. Specify in the construction documents the shop drawings that are to be submitted by the Contractor;
3. Review and take other appropriate action with reasonable promptness upon such Contractor submittals as shop drawings, product data, and samples, for conformance with the general design concept of the work as provided in the Contract Documents.
4. Review in a timely manner the shop drawings provided by the Contractor to determine conformity with the general design concept and intent of the construction documents and indicate to the Contractor such conformance with the general concept or lack thereof; and provide the Departmental Representative with one (1) signed "Reviewed and Accepted" and dated copy when such conformity is confirmed.
5. Verify that shop drawings include the project number and are recorded in sequence.

## **PROJECT BRIEF**

---

6. Shop drawings shall be stamped: "Checked and Certified Correct for Construction" by the Contractor and stamped: "reviewed with comments", "reviewed" or "rejected" by the Consultant before return to the Contractor.
7. Expedite the processing of Shop Drawings within the five (5) working days or the number of days agreed by the Departmental Representative.
8. On completion of project, forward three copies of reviewed shop drawings to the Departmental Representative. Ensure that shop drawings include the project number and are recorded in sequence.

### 2.1.6.3.15 Inspection and Testing

1. Recommend the need for, and review, test reports of materials or construction.
2. Specify in the construction documents product and performance testing to be undertaken by the Contractor.
3. Recommend quality assurance testing to be undertaken during construction, evaluate the results and advise the Departmental Representative accordingly.
4. Request the Contractor to take remedial action when observed material or construction fails to comply with the requirements of the Construction Contract, and advise the Departmental Representative accordingly.
5. Prior to tender, provide Departmental Representative with recommended list of tests to be undertaken, including on site and factory testing.
6. Ensure all testing is detailed within commissioning plan.
7. When contract is awarded, assist Departmental Representative in briefing testing firm on required services, distribution of reports, communication lines, etc.
8. Review all test reports and take necessary action with Contractor when work fails to comply with contract.
9. Immediately notify Departmental Representative when tests fail to meet project requirements and when corrective work will affect schedule.
10. Assist Departmental Representative in evaluating testing firm's invoices for services performed.
11. Ensure that all specified testing, commissioning and other quality assurance specifications and recommendations are adequately implemented throughout the construction process.

### 2.1.6.3.16 Training

1. Prior to tender, provide Department Representative with recommended list of training to be undertaken.
2. Ensure all training is detailed within the commissioning plan.

### 2.1.6.3.17 Changes to Construction Contract

1. The Consultant does not have authority to change the work or the price of the Contract.
2. Submit all requests and recommendations for changes to the Construction Contract and their implications to the Departmental Representative for approval.
3. Changes which affect cost or design concept must be approved by the Department Representative.

## **PROJECT BRIEF**

---

4. Upon approval of the Departmental Representative, obtain quotations from the Contractor in detail for contemplated changes, review the prices for acceptability and fairness, assess the effect on construction progress and completion date, and submit promptly recommendations to the Departmental Representative.
5. The Departmental Representative will issue Consultant-prepared Change Orders to the Contractor, with copy to Consultant. The Departmental Representative shall issue Change Orders for all approved changes.
6. All changes, including those not affecting the cost of the project, will be covered by Change Orders.
7. The practice of "trade-offs" is not allowed.

### **2.1.6.3.18 Contractor's Progress Claims**

1. Request from the Contractor a cost breakdown of the Construction Contract Award Price in detail appropriate to the size and complexity of the Project, or as may otherwise be specified in the Construction Contract, and submit the cost breakdown to the Departmental Representative prior to the Contractor's first progress claim.
2. Review the progress claim (request for progress claim), for work and materials as per the requirements of the Construction Documents, submitted each month by the Contractor.
3. Examine progress claims in a timely manner and, if acceptable, certify the progress claims for work completed and materials delivered pursuant to the Construction Contract, and submit them to the Departmental Representative for approval and processing.
4. If the construction is based on unit prices, measure and record the quantities of labour, materials and equipment involved for the purpose of certifying progress claims.
5. Verify at each progress payment that Contractor has accurately recorded information on the site as-built set of Contract Documents.
6. The claims are made by completing the following forms where applicable:
  - a. Request for Progress Payment
  - b. Cost Breakdown for Unit and/or combined Price Contract
  - c. Cost Breakdown for Fixed Price Contract
  - d. Statutory Declaration Progress Claim
7. Review and sign designated forms and promptly forward claims to the Departmental Representative for processing.
8. Submit with each progress claim:
  - a. Updated schedule of the progress of the work.
  - b. Detailed photographs of the progress of the work.

### **2.1.6.3.19 Materials On Site**

1. The Contractor may claim for payment of material on site but not incorporated in work.
2. Material must be stored in a secure place designated by the Department Representative.
3. Detailed list of materials with supplier's invoice showing price of each item must accompany claim; Consultant shall check and verify the list.
4. Items shall be listed separately on the Detail Sheet after the break-down list and total.



## **PROJECT BRIEF**

---

5. As material is incorporated in the work the cost must be added to the appropriate Detail item and removed from the material list.

### **2.1.6.3.20 Acceptance Board**

1. Inform the Department Representative when satisfied that the project is substantially completed. The Consultant shall ensure that his representative, his sub-consultant representative, Consultant Resident Site Representative, Contractor and major sub-trades representatives shall form part of the Project Acceptance Board and attend all meetings as organized by the Department Representative.

### **2.1.6.3.21 Substantial Performance (Interim) Inspection**

1. The Acceptance Board shall inspect the work and list all unacceptable and incomplete work on a designated form. The Board shall accept the project from the Contractor subject to the deficiencies and uncompleted work listed and priced.

### **2.1.6.3.22 Certificate of Substantial Performance (Interim)**

1. Review the construction with the Departmental Representative and the Contractor, and record all unacceptable and incomplete work detected.
2. Request from the Contractor, review for completeness and adequacy and provide the Departmental Representative with, all operation and maintenance manuals and any other documents or items to be provided by the Contractor, in accordance with the Construction Contract.
3. Prepare and submit to the Departmental Representative for approval and processing, and as a basis for payment to the Contractor, a Certificate of Substantial Performance (Interim) as required by the Construction Contract, together with supporting documents properly signed and certified.
4. Payment requires completion and signing, by the parties concerned, of the following documents:
  - a. Certificate of Substantial Performance
  - b. Cost Breakdown for Fixed Price Contract
  - c. Cost Breakdown for Unit or Combined Price Contract
  - d. Inspection and Acceptance
  - e. Statutory Declaration Certificate of Substantial Performance
  - f. Workmen's Compensation Board Certificate.
5. Verify that all items are correctly stated and ensure that completed documents and any supporting documents are furnished to the Department Representative for processing.

### **2.1.6.3.23 Building Occupation**

1. The Client may occupy the building after the date of acceptance of the building by the Acceptance Board. The acceptance date is normally that of the Interim Certificate issued to the Contractor. As of the acceptance date, the Contractor may cancel the Contract Insurance, and the Client or PWGSC (as the case may be) assumes responsibility for:

## **PROJECT BRIEF**

---

- a. Security of the work(s).
- b. Fuel and utility charges.
- c. Proper operation and use of equipment installed in the project.
- d. General maintenance and cleaning of the work(s).
- e. Maintenance of the site. (Except any landscaping maintenance covered by the contract.)

### **2.1.6.3.24 Operation and Maintenance Data Manual**

1. Operation and Maintenance Data Manual: four (4) sets of each volume produced by Contractor in accordance with Sections 01 11 01, 01 77 00, 01 78 00 of project specification and verified for completeness, relevance and format by the Architectural, Mechanical and Electrical consultants and submitted to the Departmental Representative prior to interim acceptance or actual start of operation and instruction period, whichever occurs sooner. The Contractor shall retain one copy of each volume for his record and use during the instruction period.

### **2.1.6.3.25 Instruction of Operating Personnel**

1. Make arrangements and ensure that Department's operating personnel is properly instructed on the operation of all services and systems using the final manuals as reference.
2. Consultant to provide training sessions, as required, on the subject of design intent and systems operations. Utilize Systems Operations Manual for training sessions.

### **2.1.6.3.26 Keys**

1. Ensure that all keys and safe combinations are delivered to the Department Representative as applicable.

### **2.1.6.3.27 Final Inspection**

1. Inform the Department Representative when satisfied that all work under the contract has been completed, including the deficiency items. Inspection and Acceptance as a result of the Substantial Performance (Interim) Inspection. The Department reconvenes the Acceptance Board which makes a completion (final) inspection of the project. If everything is satisfactory the Board makes final acceptance of the project from the Contractor.

## **PROJECT BRIEF**

---

### **2.1.6.3.28 Certificate of Completion (Final)**

1. Advise the Departmental Representative when the construction has been completed in general conformity with the Construction Contract.
2. Make a final review of the construction with the Departmental Representative and the Contractor and, if satisfactory, prepare and submit to the Departmental Representative for approval and final payment to the Contractor, a Certificate of Completion (Final) as required by the Construction Contract, together with supporting documents properly signed and certified, including manufacturers' and suppliers' warranties.
3. The final payment requires completion and signing, by the parties concerned, of the following documents:
  - a. Certificate of Completion
  - b. Cost Breakdown for Fixed Price Contract
  - c. Inspection and Acceptance
  - d. Statutory Declaration Certificate of Completion
  - e. Cost Breakdown for Unit and/or Combined Price Contract
  - f. Workmen's Compensation Clearance Certificate
  - g. Certificate of Acceptance from Electrical Inspection Department
4. Verify that all items are correctly stated and ensure that completed documents and any supporting documents are furnished to the Department Representative for processing.

### **2.1.6.3.29 Take-over**

1. The official take-over of the project, or parts of the project, from the Contractor is established by the Departmental Representative in consultation with the Consultant and Client/Users. The date of Certificate of Substantial Performance (Interim) and the Certificate of Completion (Final) signifies commencement of the 12 month warranty period for work completed on the date of each certificate in accordance with the General Conditions of the Contract.
2. Provide Department Representative with original copy of Contractor's warranties for all materials and work covered by an extended warranty or guarantee, according to the conditions of the specifications. Verify their completeness and extent of coverage.

### **2.1.6.3.30 As-Built and Record Drawings and Specifications**

1. Following the take-over and before issuance of the Certificate of Completion (Final), obtain as-built marked-up hard copy from the Contractor:
  - a. Show significant deviations in construction from the original Contract drawings, including changes shown on Post-Contract Drawings, changes resulting from Change Orders and/or from On Site Instructions.
  - b. Check and verify all as-built information provided by Contractor for completeness and accuracy and submit to the Departmental Representative.

## **PROJECT BRIEF**

---

2. Produce Record Drawings by incorporating changes shown on Post-Contract Drawings, changes resulting from Change Orders and/or from On Site Instructions and As-Built information, into project drawings and specifications.
3. Verify that record drawings are suitable for digital printing or scanning, incorporating all recorded changes to the original working drawings based on as-built prints, drawings and other information provided by the Contractor, together with Change Orders and On Site Instructions.
4. Verify that record drawings are labeled "Record", dated and signed by the Consultant, and provide also a marked-up copy of the specifications recording changes related thereto.
5. Submit a complete set of Record Drawings and Specifications in number and format required by the Consultant Agreement within 8 weeks of final acceptance.
6. Provide a complete set of final shop drawings.

### **2.1.6.4 DELIVERABLES:**

The Consultant shall provide the following:

1. Written reports from site visits including persons involved
2. Written reports on the progress of the work and the cost of the project at the end of each month
3. Additional detail drawings when required to clarify, interpret or supplement the Construction Documents
4. Post -Contract drawings
5. Interim or Final certificates
6. Debrief of Commissioning Activities
7. As-built drawings (hard copy provided by Contractor)
8. Record drawings and specifications
9. Progress photographs during construction and final photographs (digital format)
10. Warranty deficiency list
11. Report on Final Warranty Review

## **PROJECT BRIEF**

---

### **RS 2.1.7 COMMISSIONING**

#### **2.1.7.1 INTENT:**

The Consultant shall provide commissioning services to verify that the functional requirements have been correctly interpreted during the design stage and contract documents, and that the building systems operate consistently at the peak efficiencies, under all normal load conditions, and within the specified energy budget.

As a member of the PWGSC team, the Commissioning Manager represents the Owner's and User's interests, and is responsible for overseeing all commissioning activities during the development, implementation and post construction stages of the project.

Throughout this stage, the Consultant and Consultant's representatives on site will work closely with the Commissioning Manager, PWGSC and the Contractor to implement commissioning activities and create useful, well integrated drawings, reports and manuals, in compliance with Contract Documents.

The purpose of this stage is:

1. To define the operational and performance requirements of the Owner and User.
2. To ensure that responsibility for meeting these requirements and demonstrating compliance is defined in the design and contract documents.
3. To ensure that appropriate start-up and checkout procedures are employed for components and subsystems, including meaningful documentation for, and certification of, Quality Control reports and techniques under the normal or enhanced basic services and contractual procedures.
4. To ensure that the final product meets the specified project requirements and the criteria.
5. To document the operations, maintenance and management requirements, and transferring the completed works to qualified facility operators.
6. To minimize the life-cycle operating and maintenance costs.
7. To verify that the Department's functional requirements are correctly interpreted during the design stage, and that the building systems operate consistently at peak efficiencies, under all normal load conditions of the design intent, and within the specified energy budget.

#### **2.1.7.2 SCOPE AND ACTIVITIES:**

The Consultant shall provide, but are not necessarily limited, to the following commissioning activities:

1. Provide complete documentation on the operations and maintenance requirements;

## **PROJECT BRIEF**

---

2. Prepare Systems Operations Manual (SOM). Contents of SOM and Contractor's Operation and Maintenance (O&M) manual shall be in accordance with PWGSC Project Commissioning Manual latest edition;
3. Carry out various checks and tests to determine if the new facilities function in accordance with the contract documents;
4. Attend the commissioning testing to ensure that proper protocols are being maintained.
5. Identify Contractor and Sub-contractor commissioning, Performance Verification (PV) and testing responsibilities;
6. Plan the PV activities, develop the installation checklists and PV report forms, and prepare a detailed verification schedule. PV tests will be performed by the Contractor and witnessed by the Consultant. Maintain detailed development reports and review with the Contractor for special systems such as Energy Monitoring and Control System (EMCS).
7. PV inspection forms will be completed for all components, subsystems, systems, and integrated systems, and a final performance verification report will be submitted to the Commissioning Manager.
8. Ensure that the documentation and testing reports from the Commissioning Manager are submitted to the Departmental Representative in a proper, timely and organized fashion.
9. Prepare a training plan for the O&M staff to be trained on the operations of the new facilities. The training plan will recognize both short-term and long term requirements and shall employ both hard copy and visual techniques.

### **2.1.7.3 SCOPE AND ACTIVITIES - DETAILS:**

1. The project will be accepted and the Certificate of Substantial Completion will be issued by the Departmental Representative only after the Contractor meets the requirements of the contract and:
  - a. Successful completion of integrated systems tests, life safety support systems tests and after meeting all requirements of the authority having jurisdiction. Consultant is responsible for coordination and oversight of commissioning activities as described in more detail in RS 2.1.7.
  - b. All test certificates, commissioning reports and commissioning documentation have been approved by the Departmental Representative following review and validation by the Consultant
2. During the Construction Phase, the Consultant shall:
  - a. Monitor and report on contract commissioning activities.
  - b. Review and certify verification sheets as they are completed by the Contractor.
  - c. Review commissioning schedule.
  - d. Witness all component, system and integrated systems tests.
  - e. Review and comment on commissioning test results.
  - f. Provide advice and recommendations for fine tuning.

## **PROJECT BRIEF**

---

- g. Finalize the Design Intent Report and Client / Users O&M Manual to reflect as-commissioned operation and maintenance of each system.

### **2.1.7.4 DELIVERABLES:**

The Consultant shall provide the following:

1. Commissioning Plan,
2. Commissioning Specifications in Div 01,
3. Commissioning Verification (Cx Verification) Sheets to be executed by the Contractor,
4. Performance Verification Testing (PVT) Sheets to be executed by the Contractor,
5. Reviewed and Accepted Commissioning (Evaluation) Report.

## **PROJECT BRIEF**

---

### **RS 2.1.8 POST-CONSTRUCTION WARRANTY REVIEW**

The Consultant shall:

1. Review if requested, during the Contractor's warranty period, any defects reported by the Departmental Representative.
2. 30 days prior to the expiry of any warranty period, visit the site, and record any defects observed or reported at the end of any warranty period, carry out a final review of the Project and report to the Departmental Representative the status of defects.
3. If the Departmental Representative accepts the rectification of the defects, a notice of "Final Warranty Inspection" shall be issued to the Contractor.



## **PROJECT BRIEF**

---

### **RS 2.2 ADDITIONAL SERVICES**

The Consultant shall coordinate and manage the additional services, listed below, provided by in-house resources, Sub-Consultants and /or Specialists and required to complete project requirements in support of the requested services under Task Authorizations.

The Consultant Team may be required via Task Authorization to provide one or more of the following services, either independently or as part of a project to supplement Basic Services.

## **PROJECT BRIEF**

---

### **RS 2.2.1 INVESTIGATIONS AND REPORTS**

#### **2.2.1.1 INTENT:**

The Consultant may be required via TA to investigate a site condition or building condition to determine the life expectancy of the building system or component, the cause of the problem such as water leakage, structural deficiency, malfunction of mechanical and/or electrical systems; analyze the situation; record the conditions; and provide a recommendation for the repairs or improvement of the situation, or generate strategic options for future investment considerations to the property or building.

#### **2.2.2.2 SCOPE AND ACTIVITIES:**

1. The Consultant shall perform on site investigations and provide reports as specified by the Department Representative in the Task Authorization and shall include but not necessarily be limited to the following:

- a. Research and review original construction documents and any historical documents describing modifications to the site or building.
- b. Review site and/or building conditions and compare conditions to existing documents.
- c. Pursue more detailed investigation of site and/or building conditions including; deconstruction of components, with permission from the Departmental Representative, to determine a more comprehensive understanding of the existing conditions such as the composition of the built elements or the cause of the problem.
- d. Record findings of the investigation by recording in detail, including drawings and photographs, the location of the problem or situation, providing a description of the condition, the design capacity of the building system.
- e. Identify all deficiencies, potentials and constraints with the existing systems.
- f. Recommend alternative remedial measures for deficiencies and/or options for improvements.
- g. Prepare the report which includes the results of site investigations, review of the project scope of work and recommendations of alternative remedial measures for deficiencies and/or options for improvements and the associated cost and schedule implications of each option.

#### **2.2.2.3 DELIVERABLES:**

1. The Consultant shall, based on the specific requirements of the Task Authorization, provide a technical report summarizing findings of the investigation and recommendations for remedial measures. Reports can vary in scope from a limited building component/systems investigation (such as a roof inspection report) to a more comprehensive Building Condition Report (BCR).

## **PROJECT BRIEF**

---

### **RS 2.2.2 FUNCTIONAL PROGRAMMING**

#### **2.2.2.1 INTENT:**

The purpose of a Functional Program is to define the project functional and operational requirements, space requirements, space adjacencies, technical requirements and other parameters that will be integrated into the project. The Consultant must ensure that they have gathered sufficient information to analyze the functional and operational requirements, developed an understanding of the requirements for the building's infrastructure and applied the Senate, House of Commons, and/or Government of Canada Workplace 2.0 Fit-up Standards, as appropriate. At the time of the Task Authorization, the Departmental Representative will identify the specific services required from Functional Programming Services and the extent of the information required to be included into the Functional Program Document.

#### **2.2.2.2 SCOPE AND ACTIVITIES:**

The Consultant shall:

1. Interview the users and stakeholders to determine the functional and operational requirements for staffing, support areas, an understanding of the requirements for expansion or downsizing of the operation, special purpose areas, spatial relationships and adjacencies, and the impact of these requirements on the base building's infrastructure.
2. Attend meetings, communicate with and coordinate the other consultants and specialists.
3. Develop the format for the Functional Program Document and draft 'Table of Contents'. Submission must also include as a minimum the formatting for spreadsheets, room data sheets, cost estimates, and reports. Submit for review. Revise as required. Resubmit for final approval.
4. Prepare, coordinate and assemble the following sections of the Functional Program Document, as required by the specific Task Authorization:
  - a. Administrative Space Recommendations Report
  - b. Support Space Recommendations Report
  - c. Special Purpose Space Recommendations Report
  - d. Highly Specialized Special Purpose Spaces Report
  - e. Functional Space Equation (Space Analysis Requirement)
  - f. Gap Analysis
  - g. Proximity Recommendations Report
  - h. Security Recommendations Report
  - i. Communications/Data Recommendations Report
  - j. Audio-Visual Recommendations Report

## **PROJECT BRIEF**

---

- k. Furniture and Workstations Recommendation Report
- l. Existing Building Finishes Report, if applicable
- m. Room Data Sheets
- n. Horizontal Zoning Plans
- o. Vertical Stacking Diagrams
- p. Zoning (Bubble) Diagram

5. Consolidate the sections of the Functional Program Document.

### **2.2.2.3 DELIVERABLES - DETAILS:**

The Consultant shall, based on the specific requirements of the Task Authorization, provide the following:

#### **1. ADMINISTRATIVE SPACE RECOMMENDATIONS REPORT**

1. Gather and document the Client's administrative space requirements in a written and graphic format including but not limited to all workstation type and finishes.
2. Analyze information gathered and make recommendations in accordance with the relevant accommodation standards (e.g. Senate, House of Commons, Government of Canada Workplace 2.0 Fit-up Standards) and provide the following:
  - a. Identification of opportunities for space consolidation;
  - b. A document indicating the effects of each of the proposed planning alternatives, based on the Client's mission statement, functional requirements, space allocation, and project budget. Provide written justification and rational for each of the planning alternatives.
3. Submit for review. Revise as required. Resubmit for final approval.

#### **2. SUPPORT SPACE RECOMMENDATIONS REPORT**

1. Gather and document the Client 's support space requirements in a written and graphic format including but not limited to all work station type and finishes, i.e. systems furniture, free-standing, soft seating, case goods etc., electrical, telephone and data requirements.
2. Analyze information gathered and make recommendations for support space in accordance with the relevant accommodation standards (Senate, House of Commons, Government of Canada Workplace 2.0 Fit-up Standards) and provide the following:
  - a. Identification of opportunities for space consolidation.
  - b. A document indicating the effects of each of the proposed planning alternatives, based on the Client's mission statement, functional requirements, space allocation, and project budget. Provide written justification and rational for each of the planning alternatives.
  - c. Requirements for off-site support spaces, if applicable, must also be included and clearly noted as such.

## **PROJECT BRIEF**

---

3. Submit for review. Revise as required. Resubmit for final approval.

### **3. SPECIAL PURPOSE SPACE RECOMMENDATIONS REPORT**

1. Gather and document the Client's special purpose space requirements in a written and graphic format including but not limited to all work station type and finishes, i.e. systems furniture, free-standing, soft seating, case goods etc., electrical, mechanical, telephone and data requirements.
2. Analyze information gathered and make recommendations based on the relevant accommodation standards (Senate, House of Commons, Government of Canada Workplace 2.0 Fit-up Standards) and the Client's functional requirements and proposed planning alternatives, for layouts for each of the special purpose spaces, including but not limited to furniture type, layout, and mechanical and electrical requirements;
3. A comparative (i.e. quantitative and qualitative) analysis between existing special purpose space and each of the proposed special purpose space planning alternatives in sufficient detail to facilitate selection by the Client;
  - a. Identify options for space optimization, and use of multipurpose spaces, etc.
  - b. Identify requirements for off-site special purpose spaces, if applicable, must also be included and clearly noted as such.
  - c. Prepare a workflow diagram.
  - d. Ensure funding mechanism for any special purpose space has been identified.

As required, provide justification regarding technical requirements and estimated fees related to the fit-up of special purpose spaces.
  - e. Seek approval of the special purpose space from the Departmental Representative.
4. A document indicating the effects of each of the proposed special purpose space planning alternatives, based on the Client's mission statement, functional requirements, space allocation, and project budget. Provide written justification and rationale for each of the planning alternatives.
5. Submit for review. Revise as required. Resubmit for final approval.

### **4. FUNCTIONAL SPACE EQUATION (SPACE ANALYSIS REQUIREMENT)**

1. Prepare a detailed functional space equation in a spreadsheet format. The functional space equation must identify space requirements (in m<sup>2</sup>) by group along with summary of the total space required for all groups for the following current and future requirements:
  - a. Approved staff listings including as a minimum all full time and part time employees, students, etc. List by person, group, section, division etc;
  - b. Open workstations;
  - c. Enclosed workstations;

## **PROJECT BRIEF**

---

- d. Support space;
  - e. Collaborative Space;
  - f. Special purpose space;
  - g. Circulation factor;
  - h. Building loss factor;
  - i. Total population;
  - j. Total space required;
  - k. Summary by group and Department; and,
  - l. Non-complaint versus complaint spaces.
2. Identification of requirements for off-site special purpose spaces, if applicable, must also be included and clearly noted as such.
  3. Submit for review. Revise as required. Resubmit for final approval.

### **6. GAP ANALYSIS**

1. Prepare a gap analysis in graphic format using the appropriate accommodation standard. Gap analysis must identify open and closed office, support space, special purpose space and items, which exceed the standards.
2. Calculations for Space Allocation Limits will be provided at the time of Task Authorizations.
4. Consultant to document all non-compliant items complete with justifications (provided by Client).
3. Identify, highlight and clarify all additional costs, which are outside of the accommodation standards. Outline in the gap analysis, who is responsible for the additional costs.
5. Submit for review. Revise as required. Resubmit for final approval.

### **7. PROXIMITY RECOMMENDATIONS REPORT**

1. Document the Client's current and future proximity requirements for staff (by person-to-person, group-to-group, section-to-section etc.), support spaces and special purpose spaces. Examine the effect these may have on other functional requirements and proposed planning alternatives and make recommendations.
2. Prepare work flow diagrams for support and/or special purpose spaces.
3. Prepare proximity diagram that documents Client functional requirements in a graphic format. Prioritize level of importance for each proximity requirement identified.
4. Submit for review. Revise as required. Resubmit for final approval.

### **8. SECURITY RECOMMENDATIONS REPORT**

1. Prepare a report to document the Client's current and future security requirements and the effect these may have on other functional requirements and proposed planning alternatives.

## **PROJECT BRIEF**

---

2. Coordinate with the Client's security representative and Threat Risk Assessment.
  3. Recommend any necessary modifications to the base building. Assess the impact of these modifications on overall space, time and budget.
  4. Make specific and detailed recommendations based on additional client requirements, i.e. TRA or operational needs approved by Departmental Security Officer (DSO). Prepare a detailed list justifying the recommendations.
  5. Coordinate work performed by Mechanical and Electrical sub-consultants and incorporate into Security Recommendations Report.
  6. Submit for review. Revise as required. Resubmit for final approval.
9. COMMUNICATIONS/DATA RECOMMENDATIONS REPORT
1. Prepare a report to document the Client's current and future communications/data requirements and the effect these may have on other functional requirements and proposed planning alternatives.
  2. Prepare recommendations on all necessary modifications to the base building. Assess the impact of those modifications on overall space, time and budget.
  3. Coordinate work performed by Mechanical and Electrical sub-consultants and incorporate into the Communications/Data Recommendations Report.
  4. Submit for review. Revise as required. Resubmit for final approval.
10. AUDIO-VISUAL RECOMMENDATIONS REPORT
1. Gather and document the Client's audio-visual requirements in a written and graphic format including existing and new equipment, whiteboards, projector screens and other components requirements including the power, data and audio-visual cabling to support the operation of the equipment.
  2. Analyze information gathered and make recommendations for the compatibility of the equipment, if used within the same room and/or a mixture of existing and new equipment, and any additional requirements to accommodate the audio-visual equipment in the meeting room, training room or special purpose room requirements in accordance with the relevant accommodation standards.
  3. Provide recommended layouts for locating the audio-visual equipment within the specific rooms.
  4. Prepare a class 'C' cost estimate for the procurement of new equipment and the installation of the equipment for budget purpose of procuring their audio-visual equipment contract.
  5. Submit for review. Revise as required. Resubmit for final approval.
11. FURNITURE AND WORKSTATIONS RECOMMENDATIONS REPORT

## **PROJECT BRIEF**

---

1. Gather and document the furniture and workstations requirements in a written and graphic format including all workstation type and finishes, i.e. systems furniture, free-standing, soft seating, case goods etc., electrical, telephone and data requirements.
2. Analyze information gathered and make recommendations for the development of workstations standards in accordance with the relevant accommodation standards and provide the following:
  - a. Recommendations based on the functional requirements and proposed planning alternatives, for layouts for each category of furniture and workstations required (including as a minimum furniture type, layout, panel screen height(s) and widths and power requirements);
  - b. A comparative (i.e. quantitative and qualitative) analysis between existing furniture and workstations and each of the proposed planning alternatives in sufficient detail to facilitate selection by the Client;
  - c. A document indicating the effects of each of the proposed planning alternatives, based on the Client's mission statement, functional requirements, space allocation, and project budget. Provide written justification and rationale for each of the planning alternatives.
  - d. A minimum of three (3) layouts for each category of workstation required, unless otherwise specified in the Task Authorization;
3. Submit for review. Revise as required. Resubmit for final approval.

### **12. EXISTING BUILDING FINISHES REPORT**

1. In cases where the Functional Program is being undertaken with the intent to re-use the existing space(s), prepare a detailed list of finishes both in report and drawing formats, including drawings, list of components, description of item, building finish and colour, and an assessment of the finishes that are in a satisfactory condition and could be reused. Prepare a list of items including but not necessarily limited to:
  - a. Ceilings;
  - b. Lighting fixtures (accent and base building);
  - c. Carpets;
  - d. Hardware (doors, door hardware, glazing, and;
  - e. Fixtures (water fountains, built-in furniture, etc.),
2. Submit for review. Revise as required. Resubmit for final approval.

### **13. ROOM DATA SHEETS**

1. Compile all the data per room function (number of occupants; area in m2; critical dimensions; functional and operational requirements; essential proximity; unique characteristics or features of space; architectural requirements: wall type, STC rating, fire resistance rating, wall finishes, floor and ceiling finishes, doors/door frames and interior glazing, millwork, specialties (i.e. tackboards, whiteboards, tack strips, chair rail, corner guards); structural requirements; mechanical requirements: HVAC, plumbing; electrical requirements: power and lighting; Telecommunications requirements: voice,



## **PROJECT BRIEF**

---

data and equipment; furniture and equipment requirements; security requirements: door hardware, duress alarm, security system such as motion detector, door contact, card access, camera; audio-visual requirements: equipment, black out blinds, projector screens, remote control, lighting control; signage requirements; other special requirements) for each typical and special purpose room and prepare room data sheet as per the approved room data sheet format.

2. Submit for review. Revise as required. Resubmit for final approval.

### **14. HORIZONTAL ZONING PLANS**

1. Prepare horizontal zoning plans (i.e. block plans) per floor based on the approved functional program, and vertical stacking. Number of plans, to be identified, at time of Task Authorization.
2. Include identification of all areas and location of all main circulation aisles, designation (in m<sup>2</sup>) and position level for workstations/work settings, and designation (in m<sup>2</sup>) for support spaces and special purpose spaces. Units, divisions etc. must also be identified. Consultant to also provide a count of number of users per group and per floor.
3. Submit for review. Revise as required. Resubmit for final approval.

### **15. VERTICAL STACKING DIAGRAMS**

1. Prepare vertical stacking plans for each building based on the approved functional program, proximity requirements, and space equation.
2. Number of diagrams, to be identified, at time of the Task Authorization.
3. Submit for review. Revise as required. Resubmit for final approval.

### **16. ZONING (BUBBLE) DIAGRAM**

1. Prepare zoning (bubble) diagrams based on the approved functional program, space allocation and horizontal zoning plans, for all spaces forming part of the project.
2. Number of diagrams to be identified at time of the Task Authorization.
3. Zoning (bubble) diagrams are to include as a minimum the following:
  - a. Identification and location of hard walls/partitions;
  - b. Identification of primary and secondary circulation aisles;
  - c. Identification of functional areas (group and position titles/position levels or names) and area designation (in m<sup>2</sup>) for workstations (by group/position names); and
  - d. Identification and area designation (in m<sup>2</sup>) for support spaces and special purpose spaces.
4. Submit for review. Revise as required. Resubmit for final approval.

## **PROJECT BRIEF**

---

### **17. CONSOLIDATION OF FUNCTIONAL PROGRAM DOCUMENT**

1. Consolidate the functional requirements information, including sub-consultant and specialist work into the Functional Program Document as per the approved format.
2. When conflicting requirements or recommendations occur, provide an integrated recommendation together with adequate justification.
3. Prior to final submission of the final functional program document, it is the Consultant's responsibility to ensure that all requirements, which are NOT part of the specified accommodation standard, have been clearly identified.
4. Submit for review. Revise as required. Resubmit for final approval.

## **PROJECT BRIEF**

---

### **RS 2.2.3 FEASIBILITY STUDIES**

#### **2.2.3.1 INTENT:**

The Consultant shall prepare feasibility studies for building requirements, site plan and space planning designs for both new, and proposed additions, as well as renovation projects. Cost studies, graphic representations, etc. are to accompany the text document to further clarify or explain the rationale for decisions.

The Consultant shall attend Client/User and stakeholder meetings to gather and present information. The Consultant shall also record and distribute minutes at a frequency to be determined in conjunction with the Departmental Representative at the time of the Task Authorization.

#### **2.2.3.2 SCOPE AND ACTIVITIES:**

The Consultant shall provide, subject to confirmation of scope in individual Task Authorizations, the following:

1. A written verification of project requirements that includes objectives, parameters, timelines and budget, with reference to roles and responsibilities, lines of communications, and submission requirements for approvals, presentations, reviews.
2. A project schedule with periodic updating as determined with the Departmental Representative;
3. Assistance in preparing a risk management report for the Departmental Representative.
4. Implementation strategies that document task/activities, milestones, process for information gathering, project goals and deliverables.
5. An existing building condition report where there is an intention to renovate.
6. A Security Recommendations Report of the Client's current and future security requirements including blast requirements, and the effect they may have on the feasibility studies.
7. A Communication/Data Recommendations Report of the Client Department's current and future requirements and the effect they may have on the feasibility studies.
8. Verification of on-site conditions through the preparation and updating of master drawings to scale and in an approved AutoCAD format.
9. Building capability recommendations report to address current and future interior and exterior conditions, systems, access, conveying systems, washrooms, and other items that are likely to affect the Client's requirements.
10. Preliminary sustainability recommendations report which may include information related to reuse, recycling, waste diversion, energy and water efficiency in facilities and use of durable materials.
11. Furniture and Workstation Recommendation Report that addresses all current and future workstation types, electrical, voice and data, and the implications of panel design, space

## **PROJECT BRIEF**

---

allocation on the Client fit-up standard as indicated in a maximum of three (3) layouts for each category of workstation.

12. Support and Special Purpose Space Recommendations Report including opportunities for space consolidation, with the intent of conforming to the Client Fit-up Space requirements.
13. Functional Space Equation that addresses the space requirements in square metres (m2) along with the summary of the total space required for all groups for current and future requirements for open and enclosed workstations, support space, circulation and the other applicable areas, including off-site special purpose spaces.
14. Gap analysis to indicate fit-up standard non-compliance.
15. Vertical and/or horizontal stacking diagrams based on approved functional program, proximity requirements and space equation.
16. Horizontal zoning plans per floor that is based on approved functional program.
17. Cost estimates (Elemental Cost Analysis) in a format acceptable to the Departmental Representative.
18. Mechanical and electrical engineering design concept and solutions to be based on project requirements (number of options to be determined at time of Task Authorization);
19. Feasibility Study Document that consolidates all the requirements of the complete exercise with allowance for resubmission for final approval after predetermined reviews by the Departmental Representative.
20. Life-cycle cost analysis.
21. Structural analysis reviewing a facility's ability to meet current and future requirements.
22. Seismic analysis reviewing a facility's current and future requirements.
23. Studies to determine the compatibility of functional program with an existing, renovated, or proposed building.
24. In general, evaluation of existing facilities, including: building envelope, mechanical, electrical and structural systems, functional adaptability, and code compliance.

## **PROJECT BRIEF**

---

### **RS 2.2.4 INTERIOR DESIGN**

#### **2.2.4.1 INTENT:**

The Consultant shall prepare concept designs for space planning and furniture layout leading to contract documents that are compliant with the latest version of building codes and fire code. Colour boards and material selection that addresses sustainable initiatives, corporate imagery, and Client/User fit-up standards are to be included in the scope of work. Document and assist in identifying all requirements that exceed or are NOT part of the standards. Estimates and specifications including phasing strategy for swing space are to be addressed and represented in graphic fashion, with presentations made to the client group and Departmental Representative. Designated Substances Reports are to be reviewed for impact on finishes removal. Recycling initiatives for furniture and screens, as well as coordination with mechanical, electrical and telecommunications items for relocation are to be included in the overall submission package.

#### **2.2.4.2 SCOPE AND ACTIVITIES:**

The Consultant shall:

1. Attend all meetings and presentations required for the project. Additional Consultant Team members' shall be required to attend project team meetings to address their particular areas of expertise during the different delivery stages for each Task Authorization. The number and frequency of project team meetings will be determined at time of Task Authorization.
2. Ensure all sub-consultants attend as required throughout the various phases of the project.
3. Record the issues, decisions and action items (with responsibility) at each meeting and prepare and distribute meeting minutes within 72 hours of the meeting. Meeting minutes must clearly identify the status of the project. Presentation minutes must clearly identify any issues raised during the presentation that impacts cost, risk and schedule for the project.
4. Make presentations as identified under the RS sections to support the review and approval process;
5. Prepare and distribute status reports to the Departmental Representative on a monthly basis. Status reports must clearly identify any issues raised during the project the impacts on cost, risk and schedule for the project.
6. Coordinate the scope of work and design with other disciplines.
7. Review and coordinate the work of other contracts, if applicable such as furniture, audio-visual, security systems and IT/telecommunications, and inform the Departmental Representative if the work of other contracts will impact the design layouts and other discipline work before proceeding with the implementation of the changes.

## **PROJECT BRIEF**

---

### **2.2.4.3 DELIVERABLES - DETAILS**

The purpose of this section is to describe interior design services that may be identified and requested by the Departmental Representative at the time of Task Authorization.

#### **1. MASTER DRAWINGS**

1. Verify on-site conditions by preparing or updating master drawings to scale and in an approved AutoCAD format as per "Doing Business with PWGSC" attached at Appendix D and the PWGSC National CADD Standard including but not limited to, existing architectural/interior design, mechanical, structural, and communication/data elements on underside of suspended ceilings are correctly indicated.
2. Submit for review. Revise as required. Resubmit for final approval.

#### **2. BUILDING CAPABILITY RECOMMENDATIONS REPORT**

1. The intent of the Building Capability Report is to investigate, assess and analyze how well the building(s) meets the Client requirements, and make recommendations to suit the Client's requirements. This report must not be confused with a Building Condition Report (BCR) which identifies the capital improvement requirements necessary to maintain an asset at a specified level, throughout and at the end of a set planning horizon.
2. The Consultant must assess the capability of the existing building infrastructure and systems including as a minimum, architectural, interior design, mechanical, electrical, structural, conveying system, communications/data and security, to determine how effectively the building(s) meets Client requirements.
3. Prepare the Building Capability Report in reference to the Client's functional requirements. The report must include but will not necessarily be limited to:
  - a. Results of site investigations and comprehensive review of the project requirements;
  - b. Location and capability of existing infrastructure and building systems including architectural/interior design, mechanical, electrical, structural, conveying system, communications/data and security systems;
  - c. Deferred maintenance; curable/incurable equipment obsolescence; design problems and deficiencies that are likely to affect the Client requirements;
  - d. Identification of all deficiencies, potentials and constraints with the existing building systems to support the Client's functional requirements and proposed planning alternatives;
  - e. Areas of concern including an assessment of their impact on space, time and budget;
  - f. Preliminary recommendations and alternative remedial measures for areas of concern;

## **PROJECT BRIEF**

---

- g. Preliminary assessment of the buildings conformance with the PWGSC Sustainable Development Strategy; and
      - h. In buildings or floor spaces where existing construction and or fit up exist and are to be reused, assess building conformance with the relevant accommodation standards.
    4. Coordinate work performed by Mechanical and Electrical engineering sub-consultants and incorporate into the Building Capability Recommendations Report. Mechanical and Electrical engineering services must be complete in that they identify all issues that will have a significant impact on the project.
    5. Submit for review. Revise as required. Resubmit for final approval.
3. **SUSTAINABILITY RECOMMENDATIONS REPORT**
  1. Sustainability Recommendations Report will include but will not necessarily be limited to the following:
    - a. Identification of construction, renovation and demolition waste materials diversion target (minimum is 75% or more);
    - b. Recommendations for sustainable sound construction materials (renewable, recycled content, durable materials);
    - c. Energy and water efficiency in facilities (including heating, ventilation, lighting, low water consumption appliances, etc.); and
    - d. Complete sustainability checklist using either Green Globe Fit up, LEED Commercial Interiors tool or other recognized system, as approved by PWGSC. The checklist must include the projected Sustainability Goal intended to be achieved and the rationale for including and excluding specific elements on the checklist.
  2. Coordinate work performed by Mechanical and Electrical engineering sub-consultants and incorporate into preliminary report.
  3. Submit for review. Revise as required. Resubmit for approval.
4. **SCHEMATIC PLANS**
  1. Prepare three (3) schematic plans per floor, unless otherwise specified in the Task Authorization.
  2. The schematic plans must reflect the approved Client/User's overall functional requirements but not necessarily any particular group, division etc.
  3. The schematic plans must contain sufficient detail (including furniture, workstations etc.) to graphically illustrate the relevant accommodation standard, and the functional program requirements established in RS 2.2.2 Functional Programming.
  4. The following must be included:
    - a. Identification of all partition including door swings;

## **PROJECT BRIEF**

---

- b. All circulation paths;
    - c. Proposed workstation layouts for both enclosed offices and open areas;
    - d. Support space for both enclosed areas and open areas;
    - e. Special purpose spaces as required to illustrate the overall design strategy; and
    - f. Identification of all areas including name, room numbers and size.
  5. Provide a written justification and summary for each option including as a minimum: number of workstations and enclosed offices according to size and level, total number of end users, types and number of support spaces, types of special purpose spaces, percentage of circulation, percentage of building loss factor and percentage of open offices versus closed offices.
  6. The schematic plans must reflect the space allocation, approved functional program and project budget (refer to fit-up costs (m<sup>2</sup>/\$).
  7. The plans must be consistent with the building's configuration and systems including as a minimum: mechanical, electrical, structural, communications/data, security.
  8. Submit schematic plans for review. Revise as required. Resubmit for final approval pending review and approval by authorities having jurisdiction.
5. MECHANICAL AND ELECTRICAL ENGINEERING DESIGN CONCEPT
1. Prepare mechanical and electrical engineering design concept documents in sufficient detail to illustrate the mechanical and electrical engineering design concept and to demonstrate compliance with the project requirements. Develop design concept solutions that accommodate the Client's requirements; respond to the existing building, its surrounding context and the project budget. Provide option analysis complete with life cycle cost analysis.
  2. Number of options to be identified at time of Task Authorization.
  3. Design Concept and alternative solutions must adhere to the relevant accommodation standard.
  4. Prepare mechanical and electrical engineering drawings to include analytical diagrams, schematic bubble diagrams, plans, elevations and sections. Perspective sketches may be requested.
  5. Submit for review. Revise as required. Resubmit for final approval.
6. REVIEW AND APPROVAL BY AUTHORITIES HAVING JURISDICTION
1. Submit client approved schematic plans to the authorities having jurisdiction.
  2. Submit client approved schematic plans to Federal Heritage Building Review Office (FHBRO) as required by the project.
  3. Revise plans as required and provide written response to comments received from authorities having jurisdiction.



## **PROJECT BRIEF**

---

4. Coordinate review and approval process by Authorities having Jurisdiction with Mechanical and Electrical engineering sub-consultants and ensure written responses to comments are provided.
  5. Submit for review. Revise as required. Resubmit for final approval.
7. FEASIBILITY STUDY
1. Prepare a report that examines the viability and practicality of an Interior Design project.
  2. Make detailed and specific recommendations. Provide analysis and justification as required.
  3. Submit for review. Revise as required. Resubmit for approval.
8. VERIFICATION OF FUNCTIONAL PROGRAM
1. Review, update and/or complete Functional Program Document prepared by others. Refer to RS 2.2.2 Functional Programming and coordinate with Departmental Representative to determine list of services and deliverables required for Functional Program Document.
  2. Ensure content of Functional Program Document prepared by others includes required deliverables described in RS 2.2.2 and that the deliverables are complete and still current, i.e. up-to-date and approved by the Departmental Representative.
  3. Update the functional program deliverables as required.
  4. Submit for review. Revise as required. Resubmit for final approval.
9. VERIFICATION OF SCHEMATIC PLANS
1. Review, update and/or complete the Schematic Design deliverables prepared by others. Refer to RS 2.1.2 Design Concept (Schematic Design) and deliverables.
  2. Ensure Schematic plans prepared by others includes the deliverables described in RS 2.1.2 Design Concept (Schematic Design), and that the deliverables are still current, i.e. up-to-date and are approved by the Client.
  3. Provide a detailed list of all requirements that exceed the relevant accommodation standard. Assist PWGSC in the reconciliation and approval process for any and all non-compliant components.
  4. Update the schematic plans as required.
  5. Submit for review. Revise as required. Resubmit for final approval.
10. TEST PLANS
1. Develop test plans of floor plate (or portion, depending on the size of the floor plate) in sufficient detail to test the viability of the workstations/work settings layouts and support space options being considered. Include special purpose space options as required.

## **PROJECT BRIEF**

---

2. Number of test plans to be identified at time of Task Authorization.
3. Test plans must reflect Client's overall functional requirements but not necessarily any particular group, division etc.
4. Test plans must include circulation paths, building loss factor.
5. Submit for review. Revise as required. Resubmit for final approval.

## **PROJECT BRIEF**

---

### **11. INVENTORY AND ASSESSMENT OF EXISTING FURNITURE AND EQUIPMENT**

1. Prepare a detailed furniture and equipment inventory report including drawings of existing furniture and equipment layouts and a chart indicating counts, sizes of furniture and equipment, list of furniture components and equipment, a description of existing finishes and colours, photographs of each typical furniture component and equipment, and an assessment of the condition of existing furniture for the following areas:
  - a. Workstations/work settings;
  - b. Enclosed offices;
  - c. Support space; and,
  - d. Special purpose space.
2. Furniture and equipment layouts described above must include identification of existing location, and user's name or workstation number, if applicable.
3. All information gathered under items 1 and 2 above must be assembled into a report format.
4. Submit for review. Revise as required. Resubmit for final approval.

### **12. FREE-STANDING FURNITURE**

1. Provide generic requirements for new free-standing furniture required for the project. Including but not limited to the following:
  - a. Identification of furniture by type (i.e. single pedestal desk credenzas, files, chairs, etc.);
  - b. Dimensions;
  - c. Total number of units;
  - d. Typical layouts if applicable;
  - e. Technical requirements if applicable;
  - f. Finishes; and
  - g. Associated unit price ranges and budget information.
2. Submit for review. Revise as required. Resubmit for final approval.

### **13. SYSTEMS FURNITURE**

1. Provide generic requirements for new systems furniture to be procured including as a minimum the following:
  - a. Identification of furniture type (e.g. desking or panel hung systems etc.);
  - b. Description of components (e.g. overhead bins, file pedestal etc.);
  - c. Dimensions;
  - d. Typical layouts;
  - e. Total number of each layout type and/or total component count;
  - f. Technical requirements (e.g. panel height(s), mobility, height adjustability, electrical requirements etc.);

## **PROJECT BRIEF**

---

- g. Finishes; and
- h. Associated unit price ranges and budget information.
- 2. Submit for review. Revise as required. Resubmit for final approval.

### **14. REFURBISHMENT OF EXISTING FURNITURE**

- 1. Provide a detailed inventory of existing furniture to be refurbished including as a minimum the following:
  - a. Identification of furniture by manufacturer and type (e.g. work surfaces, desks, chairs, file cabinets etc.);
  - b. Total number of units;
  - c. Existing/new finishes; existing/new location; and
  - d. Associated budget information.
- 2. Submit for review. Revise as required. Resubmit for final approval

### **15. COLOUR BOARDS**

- 1. Develop colour schemes boards that clearly demonstrates the intended use of materials including as a minimum architectural finishes, interior design finishes, paint colours, and finishes for furniture and furnishings.
- 2. In a written format, identify the colour, pattern, texture, name, manufacturer and reference number for each finish and colour identified.
- 3. Submit colour schemes and material samples for review. Revise as required. Resubmit for final approval.

### **16. PRESENTATION BOARDS**

- 1. Prepare the approved schematic plans, vertical stacking diagrams, horizontal zoning plans, and/or final furniture plans for presentation purposes.
- 2. The presentation technique selected by the Consultant must clearly communicate both the functional and aesthetic aspects of the proposed fit-up developed for the Client All presentation boards must be completed at an appropriate scale, mounted on boards, and colour rendered. Elevation and perspective views, as required, must include human figures for scale.
- 3. Present the material to the Departmental Representative and the Client.
- 4. Submit comments from presentation(s), if any, in the form of meeting minutes.
- 5. Revise the presentation material as required. Resubmit for final approval.

### **17. PRESENTATION TO UPPER MANAGEMENT**

- 1. Assist the Departmental Representative or appropriate representative from the Client in preparing a presentation to upper management of the Client, to achieve an executive level understanding of the project, to present progress status reports, obtain feedback, and/or seek approval.

## **PROJECT BRIEF**

---

2. Attend the presentation and provide all required assistance.
3. Submit the findings from the presentation in the form of meeting minutes. Revise as required. Resubmit.

### **18. CLIENT/USER EMPLOYEE INFORMATION SESSION**

1. Assist the Departmental Representative or appropriate representative from the Client/Users in the preparation of an information session for employees to explain the following:
  - a. Goals and objectives of the project;
  - b. Employee involvement;
  - c. Communication strategy for disseminating project information; and/or
  - d. Project schedule.
2. Attend the presentation and provide all required assistance.
3. Submit findings from the Client/Users employee information session in the form of meeting minutes. Revise as required. Resubmit.

### **19. FOCUS GROUP SESSIONS**

1. Prepare, coordinate and conduct focus group sessions with participants chosen by the Client, to assist in the information gathering process, and/or to assess the viability of proposed planning alternatives. Participants may include representatives from property management, human resources, labour relations, information technology, corporate communications, security and representatives from various divisions (i.e. directorates, branches, sectors, units etc.).
2. Submit findings from the focus group sessions in the form of meeting minutes. Revise as required. Resubmit.

### **20. RELATED PUBLIC SPACES**

1. Provide Functional Program services described in the Required Services (RS) section of this document that are applicable to upgrading the base building outside the office space described in the Task Authorization. These related public spaces might include, as a minimum, lobbies, washrooms, and/or elevator cabs. This does not include areas within the office fit-up space where higher interaction with the general public might occur (i.e. reception area, service counter).
2. Confirm project budget related to the fit-up of related public spaces and provide justification regarding functional and technical requirements along with Class 'D' estimates.
3. Submit for review. Revise as required. Resubmit for final approval.

## **PROJECT BRIEF**

---

### **21. DETAILED COMMUNICATION STRATEGY**

1. Prepare a detailed communications strategy in relation to the functional program. Report to include as a minimum:
  - a. Written and verbal communication strategy within project team
  - b. Written and verbal communication strategy outside the project team; and
  - c. Other communication strategies, as required.
2. Submit for review. Revise as required. Resubmit for final approval.

### **22. TRANSFER OF INFORMATION**

1. The Consultant is required to present a formalized presentation/summary of their required services and deliverables in order to provide a historical context and a complete overview of the project parameters to the project team.
2. The Consultant must provide the following deliverables, which will include as a minimum:
  - a. Proposed agenda for formal approval by the Departmental Representative;
  - b. A written narrative/overview to identify and describe all significant factors which have influenced the decision-making process during the project; and a briefing on the last document submission;
  - c. After completion of the presentation, the written narrative/overview must be submitted to the following:
    - i) one (1) hard copy to the Departmental Representative;
    - ii) one (1) hard copy to the Client Department; and
    - iii) one (1) hard copy and one (1) electronic non-PDF copy to the Architecture and Engineering Resources (where applicable).

### **23. CLASS 'D' COST ESTIMATE**

1. Prepare a Class 'D' cost estimate (Elemental Cost Analysis). Estimate must be summarized in an agreed and consistent elemental format, by discussion with the Departmental Representative.
2. Cost estimate is to include as a minimum architectural, interior design, mechanical and electrical.  
Class 'D' estimate is to isolate and show separately the cost of base building costs, fit-up costs and Client costs.
3. Submit for review. Revise as required. Resubmit for final approval.

### **24. COORDINATION OF OTHER CONTRACTS BY OTHERS**

1. The Consultant is to review and coordinate with the sub-consultants and specialists the scope of work of other contracts (scope of work procured by PWGSC or Client for security systems, audio-visual equipment, telecommunication cabling, system

## **PROJECT BRIEF**

---

furniture, high density mobile storage, etc.) with the scope of work within the project of the Task Authorization.

2. The Consultant shall inform the Departmental Representative of any discrepancies or conflicts that would impact the project and recommend options to the Departmental Representative how to resolve the conflicts.

## **PROJECT BRIEF**

---

### **RS 2.2.5 ACCESSIBILITY AUDITS**

#### **2.2.5.1 INTENT:**

The Consultant shall conduct an accessibility audit of both exterior and interior spaces using the audit templates provided by the Departmental Representative to indicate basic or enhanced accessibility requirements, associated costs, and corrective action. Photographs and diagrams are to be included to identify scope areas.

#### **2.2.5.2 SCOPE AND ACTIVITIES:**

The Consultant shall:

1. Attend all meetings and presentations required for the project. Additional Consultant team members' shall be required to attend project team meetings to address their particular areas of expertise during the different delivery stages for each Task Authorization. The number and frequency of project team meetings will be determined at the time of Task Authorization;
2. Ensure all sub-consultants attend as required throughout the various phases of the project;
3. Record the issues, decisions and action items (with responsibility) at each meeting and prepare and distribute meeting minutes within 72 hours. Meeting minutes must clearly identify the status of the project.

#### **2.2.5.3 DELIVERABLES:**

The Consultant shall provide the following:

1. Written reports including the audit templates, photographs of existing conditions, drawings and recommendations for rectification.



## **PROJECT BRIEF**

---

### **RS 2.2.6 SUSTAINABILITY REPORTS**

#### **2.2.6.1 INTENT:**

The Consultant is to research and investigate a wide range of sustainability solutions for a specific project with the objective to achieve the targets and conform to commitments made at the federal, departmental and branch level, including; but, not limited to:

1. Recycling and reuse of materials, systems, equipment;
2. Procurement of “green” materials;
3. Energy reduction and management, including GHG emission reduction;
4. Water reduction and management;
5. Waste reduction and management;
6. Life-cycle costing, life-cycle assessment and cost benefit analysis;
7. Integrated Design process;
8. Achieving carbon neutral or carbon negative design.

#### **2.2.6.2 SCOPE AND ACTIVITIES:**

The Consultant shall:

1. Research and investigate sustainable development strategies in the context of the project and make recommendations.
2. Prepare a detailed inventory of existing non-contaminated materials, systems, equipment identified for reuse or recycling. Include target markets for recycled material and make recommendations. Revise as required. Obtain approval.
3. Investigate and identify potential “green” building materials and products for the project including sourcing (i.e. In order to meet government objectives, sole source may be necessary). Revise as required. Obtain approval.
4. Investigate and analyze potential to maximize energy conservation. Make recommendations for an Energy Reduction and Management plan. Undertake energy modelling.
5. Investigate and analyze potential to increasing energy efficiency, and strategies to decrease water run-offs and water consumption.
6. Develop a non-hazardous and hazardous waste reduction and management plan. Make recommendations. Revise as required. Obtain approval.
7. Based on the recommendations included in 1 to 4, perform a cost / benefit and life-cycle costing analysis, life cycle assessment for the project.

#### **2.2.6.3 SCOPE AND ACTIVITIES - DETAILS:**

1. At the **Analysis Stage**:

The Consultant shall prepare a sustainability development strategies and report that includes the following aspects as a minimum:

## **PROJECT BRIEF**

---

1. Review potential for environmental impacts and application of the Canadian Environmental Assessment Act (CEAA).
2. Review and confirm the proposed assessment of Sustainable Development Design standards to be applied to the project, such as to achieve LEED certification, or any other assessment tool deemed suitable for the specific task (i.e. Green Globe, BREEAM, Living Building Challenge etc).
3. Establish a framework for the project to minimize environmental impacts consistent with the project objectives and economic constraints.
4. Identify sustainable design opportunities, strategies, targets, preliminary budgets (i.e. energy, water, waste, etc.).

### **2. At the **Design Concept Stage**:**

The Consultant shall provide a Sustainable Design Strategy that includes the following as a minimum:

1. Provide sustainable design opportunities, strategies, preliminary budgets (i.e. energy, water, waste, etc.). Demonstrate life cycle costing for a sustainable design allowance to demonstrate that investment in sustainable technologies and processes return a value to PWGSC.
2. Identify which LEED (or other suitable approved assessment tool) water efficiency credits, energy credits, material credits, indoor environmental quality credits will be pursued. For those credits identified, provide a short description on how they will be achieved.

### **3. At the **Design Development Stage**:**

The Consultant shall provide, as a minimum:

Updated sustainable design opportunities, strategies, updated budgets (i.e. Energy, water, waste, sustainable procurement strategies, etc.).

1. Updated energy analysis and energy budget established for all disciplines at the Design concept stage.
2. Information on all internal and external energy loads in sufficient detail to determine the compatibility of the proposal with existing services, approved concept and energy budget.
3. Sustainable design target (as per the departmental and branch environmental sustainable strategies) for the determined system scorecard (eg. LEED, Green Globes, etc.) indicating which credits the design does or will meet.

#### **2.2.6.4 DELIVERABLES:**

The Consultant shall:

## **PROJECT BRIEF**

---

1. Submit the Sustainability for review, in a report.
2. Revise as required.
3. Resubmit for final approval.

## **PROJECT BRIEF**

---

### **RS 2.2.7 RESIDENT SERVICES DURING CONSTRUCTION**

#### **2.2.7.1 INTENT**

The purpose of the Resident Site services is to ensure the presence of the Consultant's full-time representative on site to inspect, to co-ordinate, and to monitor all aspects of the work during the construction of the facility, as well as to liaise with the Contractor, with Public Works And Government Services Canada, and with other stakeholders as appropriate to the work. More than one person may be required to suit the hours of construction, the skills required depending on the nature of the work being executed, and on the advancement phase of construction work on site.

The Consultant Resident Site Representative is responsible for providing continuous (including overtime when construction operations perform multiple shifts per day) site review for all aspects of the project, maintaining daily records of all construction work placed. He/she is to ensure constant communication amongst the Departmental Representative, Consultant Team, Contractor, and the Provincial Department of Labour.

The Consultant Resident Site Representative (RSR) shall:

1. be directly responsible to the Consultant and to all members of the Consultant's team of specialist sub-consultant disciplines.
2. liaise with the Departmental Representative, the Contractor, and with other project team members and stakeholders.
3. be thoroughly familiar with the Contract documents, the National Building code and all Fire Commissioner of Canada Standards for Construction operations. The Consultant Resident Site Representative shall also be aware of all Federal, Provincial and Municipal standards for the health and safety of construction workers.
4. be thoroughly familiar with the requirements of the Consultant Project Brief and project responsibilities of others which relate to his services.

#### **2.2.7.2 SCOPE, ACTIVITIES AND DELIVERABLES:**

##### **1. General:**

The Consultant Resident Site Representative(s) shall:

1. Provide full time resident inspection, clarification, co-ordination and monitoring during the construction work and be responsible to the Consultant. In addition, the Departmental Representative may delegate additional responsibilities subject to the Consultant's agreement.
2. Maintain daily records of all construction work placed and ensure constant communication amongst the Departmental Representative, Consultant Team, and the Contractor.

## **PROJECT BRIEF**

---

3. Co-ordinate and direct an assistant if required in Task Authorization as approved by PWGSC.
4. In case of emergencies, the Consultant Resident Site Representative is empowered to stop the work, or give orders to protect the safety of the workers or Crown property.

### **2. Inspection and Reporting**

The Consultant Resident Site Representative shall inspect all phases of the work in progress to ensure conformance with the contract documents and accepted construction procedures. He/she shall keep a daily log of such inspections and shall issue a weekly written report to the Consultant, both for distribution, in the form directed. The Consultant Resident Site Representative shall make any other reports or surveys as may be requested by the Departmental Representative through the Consultant, and as per the Task Authorizations.

### **3. Interpretation of the Contract Documents**

Interpretation of the contract documents shall be the responsibility of the Consultant. The Consultant may, however, delegate specific duties while maintaining responsibility.

It shall be the duty of the Consultant Resident Site Representative to assist the Consultant and to further inform the Consultant of any anticipated problems which may delay the progress of the work. The method for relaying such information shall be determined by the Consultant.

### **4. Changes in the Work**

The Consultant Resident Site Representative shall not authorize or order any change in the work which will constitute a change in design or in the value of the contract except as approved in writing by the Departmental Representative.

### **5. Communication & Liaison**

The Consultant Resident Site Representative shall:

1. Convey the Consultant's instructions regarding the required standards of workmanship to the Contractor(s).
2. Verify that the work on site is in accordance with the Construction Documents, confer and obtain guidance on these findings with the Consultant. The matter is then to be brought to the attention of the Contractor's Superintendent. Although informal discussions with Sub-trade Superintendents are usually permissible, (but only with the agreement of the Contractor), the Resident Site Representative should not deal directly with foreman or tradesmen, or interfere with the progress

## **PROJECT BRIEF**

---

of the work. Communication with the Contractor should generally be formalized in writing, with notification of the Departmental Representative and the Consultant.

4. Contact the Consultant immediately when it is apparent that information or action is required of the Consultant (e.g. general instructions, clarifications, sample of shop drawing approvals, requisitions, contemplated change orders, site instructions, details, drawings, etc.)
5. Accompany PWGSC representatives on inspections and report as required on the Consultant responses to the project requirements, comments or instructions of the PWGSC's forces. Note that the Resident Site Representative should encourage such requirements, comments or instructions to be provided to him in writing.
6. Consider and evaluate any suggestions or modifications to the documents advanced by the Contractor and immediately report these to the Consultant with comments.
7. Ensure that PWGSC and the Consultant are notified promptly when key pieces and/or components of materials and equipment are delivered, so that these parties can arrange for the appropriate personnel to have an opportunity to inspect same prior to installation.

The Resident Site Representative must investigate, schedule and approve in writing, all temporary or permanent connections into any of the buildings' systems prior to the work being done. He/she shall provide advanced forecasts and advise the PWGSC Property Manager of any interruption of normal building services with a minimum 24 hours' notice prior to the work being undertaken, where this work cannot be done during the silent hours.

### **6. Daily Log**

The Consultant Resident Site Representative shall:

1. Keep a daily log recording:
  - a. weather conditions, particularly unusual weather relative to construction activities in progress;
  - b. Workforce on site: construction firms on site, work being done by each firm, number of workers per firm, equipment on site (used and unused);
  - c. Any instructions given to the Contractor;
  - d. major material and equipment deliveries and removals;
  - e. daily activities and major work done;
  - f. start, stop or completion of activities; quantities of each type of work done and in progress, shutdowns (time start and end/firms/workers affected);
  - g. presence of inspection and testing firms, tests taken, results, etc;
  - h. Explicit confirmation of expected site conditions encountered, or a full description of unusual site conditions experienced;
  - i. significant developments, remarks, etc;
  - j. special visitors or events on site;
  - k. authorities given to the Contractor to undertake certain or hazardous works;
  - l. environmental incident/accidents;

## **PROJECT BRIEF**

---

- m. Safety incidents/accidents;
- n. Record significant inspections of work performed;
- o. reports, instructions from Appropriate Authorities Response Actions.

Note: The log is the personal property of the Resident Site Representative. Copies of the log book, certified as copies, are to be provided to the Departmental Representative and the Consultant at the end of the project.

- 2. Provide copies of the daily log to the Departmental Representative on a daily basis.
- 3. Maintain a collection of electronic photographs, taken on a daily basis, that illustrate daily activities on site, including deficiencies, progress, special conditions, etc.
- 4. Incorporate date taken onto the photographs and into file names.
- 5. At the end of construction, submit a report to the Departmental Representative containing all daily logs and photographs compiled in a sequential manner.

### **7. Weekly Records**

The Resident Site Representative shall prepare weekly reports for the Consultant with copy to the Departmental Representative in the form directed, including:

- 1. progress relative to schedule;
- 2. major activities started or completed during the week; main activities in progress;
- 3. major deliveries of materials and/or equipment;
- 4. difficulties encountered which may cause delays in completion;
- 5. materials and labour needed immediately;
- 6. cost estimates of work completed and materials delivered (for cost plus contracts) as may be requested by PWGSC;
- 7. Any outstanding information or action required by Consultant or PWGSC;
- 8. work force;
- 9. Weather;
- 10. Other remarks;
- 11. accidents on site;
- 12. life safety or building hazards caused by the work, the Contractor or his agents.

### **8. Site Records**

The Resident Site Representative shall maintain orderly and updated files at the site for the use of the Departmental Representative, Consultant and him/herself as follows:

- 1. Contract and Tender Documents.
- 2. Approved Shop Drawings.

## **PROJECT BRIEF**

---

3. Approved Samples.
4. Samples.
5. Site Instructions.
6. Contemplated Change Orders.
7. Change Orders.
8. Memoranda.
9. Test and Deficiency Reports.
10. Site photographs
11. Correspondence and Minutes of Meeting.
12. Names, addresses, telephone numbers of Client representatives, Consultant and all Contractors, sub-trades key personnel associated with the contract; including home telephone numbers in case of emergencies.

In addition, the Consultant Resident Site Representative shall maintain an updated progress schedule.

A reproduction of the original contract drawings shall be carefully preserved and shall be kept marked up to date with all addenda, change orders, site instructions, details, as-built conditions, etc., issued subsequent to the award of the contract.

### **9. Inspection of the Work**

The Consultant Resident Site Representative shall make on site observations and spot checks of the work to determine whether the work, materials and equipment conform to the contract documents and supplementary conditions. The Consultant Resident Site Representative shall advise the Contractor of any deficiencies or unapproved deviations via memorandum and report immediately to the Consultant and Departmental Representative any of these on which the Contractor is tardy or refuses to correct.

The Consultant Resident Site Representative shall arrange for the Consultant's architectural, structural, mechanical, electrical and other consultants to make the periodic inspections required by the Consultant's contract, and for these inspections to be made timely with respect to the progress of the work.

The Consultant Resident Site Representative shall also report if materials and equipment are being incorporated into the project prior to approval of relative shop drawings or samples.

The Consultant Resident Site Representative shall assist in the preparation of all deficiency reports, interim, preliminary, and final, in collaboration with the PWGSC and Consultant's representatives.

The Consultant Resident Site Representative shall be responsible for the measurement of all work to be done on a unit-cost basis.



## **PROJECT BRIEF**

---

### **10. Site Meetings**

The Consultant Resident Site Representative shall attend all job-site meetings.

### **11. Inspection and Testing**

The Consultant Resident Site Representative must see that the tests and inspections required by the contract documents are conducted, and must observe these tests and report the results in the daily log. The Consultant must be notified if the test results do not meet the specified requirements, or if the Contractor does not have tests undertaken as required.

### **12. Emergencies**

In the case of emergency where safety of persons or property is concerned, or work is endangered by the actions of the Contractor or the elements, to safeguard the interests of PWGSC, the Consultant Resident Site Representative shall give immediate written notice to the Contractor of the possible hazard. He/she shall further, if necessary, stop the work or give orders for remedial work, and contact the Consultant immediately for further instruction.

### **13. Limitations**

The Consultant Resident Site Representative shall not:

1. Authorize deviations from the contract documents.
2. Conduct tests.
3. Approve shop drawings or samples.
4. Advise the user-client in any matter without obtaining guidance from the Consultant.
5. Accept any work or portions of the building.
6. Enter into the area of responsibility of the Contractor's Field Superintendent.
7. Stop the work unless convinced that an emergency exists as noted above.

### **14. Hazardous Construction Operations**

It is the duty of the Consultant Resident Site Representative to examine all site conditions and methods to be used by the Contractor undertaking hazardous operations.

Give written authority to undertake hazardous operations to the Contractor, when fully satisfied that all necessary precautions and acts have been taken by the Contractor to safeguard the life safety of the workers and building occupants and Crown property. Written authority shall be countersigned by the Contractor to acknowledge that the latter is aware of the Consultant Resident Site representative's instructions and requirements and both parties will retain copies of the authority document signed mutually by them.

## **PROJECT BRIEF**

---

The Consultant Resident Site representative shall inspect the areas where hazardous work is under way to ensure that the Contractor is maintaining the agreed safety standards. Any infractions may result in the Resident Site representative stopping the work. All infractions, or work stoppages ordered shall be reported in writing and verbally to the Consultant and the Departmental Representative.

### **15. Building Security**

Special precautions must be taken at all times to prevent unauthorized entry of the building. The Consultant Resident Site Representative is to ensure that all contractor-made openings and means of access, are firmly secured when the Contractor leaves the site. The Consultant Resident Site Representative will liaise closely with the Consultant and PWGSC Departmental Representative on all security and/or safety problems that may arise due to the Contractor's operations.

## **PROJECT BRIEF**

---

### **RS 2.2.8 ESTIMATING AND COST PLANNING**

#### **1.2.8.1 INTENT:**

##### **Cost Specialist**

Delivering the project on time and within budget is a high priority. A fully qualified cost estimating, cost planning and cost control team, referred to herein as the Cost Specialist, with a demonstrated record of successful cost management on large construction projects is required. This Cost Specialist must be conversant with all aspects of construction cost estimating during the design stages including the use of Elemental Cost Analysis, Risk Analysis, Life Cycle Costing and Value Engineering/Management techniques.

The purpose of cost planning and cost control is to assist in the accomplishment of project cost objectives. It is a continuous and interactive process involving planning, action, measurement, evaluation and revision.

#### **2.2.8.2 SCOPE OF SERVICES:**

The Cost Specialist shall provide an interactive and continuous cost consulting service from the commencement of project design through to construction completion, including the preparation of complete estimates for all construction trades, escalation, inflation and contingency costs.

The Cost Specialist shall provide to PWGSC and the Consultant, a cost advising, and cost monitoring/reporting service.

The Cost Specialist shall attend all project meetings throughout the design phases and be prepared to present and defend the estimates directly to the Departmental Representative.

#### **2.2.8.3 SERVICES - BASIC ACTIVITIES**

The Cost Specialist shall work with and advise the Stream 2 Consultant Team and PWGSC of the costs of individual building components and costs of various design systems. Estimates should be prepared in detail and summarized using an Elemental Analysis format. Acceptable formats are noted under the Submission Standards section following.

### **1. REPORTING**

#### **(a) Milestone Reporting:**

At each of the project deliverable milestones specified in this Project Brief, provide a complete Milestone Report submission including the required Elemental Summaries, supported by all backup work sheets clearly detailing the process used in preparing the estimate. The detailed work sheets will be the prime basis on which estimates will be reviewed by PWGSC. Cost

## **PROJECT BRIEF**

---

comparisons and cost reports identifying and explaining the differences between each succeeding cost estimate and their cost effect are also required.

In addition, the Cost Specialist shall fully coordinate all estimates with schedules.

At a minimum, the Milestone Report will contain:

1. Project Estimate Summary;
2. Elemental Estimate Summary;
3. Estimate Back-Up Detail:
  - Basis for escalation, inflation and contingency calculations;
  - Detailed measurement and pricing;
4. Narrative:
  - Outline description of estimate basis;
  - Description of information obtained and used in the estimate including the date received;
  - Listing of notable inclusions;
  - Listing of notable exclusions; listing of items/issues carrying significant risk;
  - Notes on past and forecast Cost Specialist activity;
5. Estimate Reconciliation:
  - With last submission;
  - With Construction Cost Plan;
  - Any other relevant information.

### **(b) Monthly Report**

In addition to the Milestone Reports, the Cost Specialist must submit a Monthly Report outlining activities during the previous month, identifying areas of concern and new information received etc., along with forecast and proposed revisions to the current estimate. This report shall also contain a full up-to-date Elemental Cost Summary including:

1. Project Estimate Summary;
2. Elemental Cost Summary;
3. Narrative:
  - Description of the basis for estimate revision;
  - Description of new information used in the estimate including the date received
  - Listing of notable inclusions;
  - Listing of notable exclusions;
  - Listing of items/issues carrying significant risk;
  - Notes on past and forecast Cost Specialist activity.

## **PROJECT BRIEF**

---

### **(c) Exception Report**

The Cost Specialist is to provide continuous cost monitoring, timely identification and early warning of all changes that affect or potentially affect the estimated construction costs of the project.

If the estimate falls short of or exceeds the Construction Cost Plan due to such changes, the Cost Specialist with the Stream 2 Consultant team shall fully advise the Departmental Representative.

The Cost Specialist with the Stream 2 Consultant team shall submit to PWGSC proposed alternative design solutions and revise the most recent monthly estimate.

The Cost Specialist must prepare an Exception Report that must include sufficient description and cost detail to clearly identify:

1. Scope Change: Identifying the nature, reason and total cost impact of all identified and potential project scope changes affecting Construction Cost Estimate.
2. Cost Overruns and Underruns: Identifying the nature, the reason and the total cost impact of all identified and potential cost variations.
3. Options Enabling a Return to Construction Cost Estimate: Identifying the nature and potential cost effects of all identified options proposed to return the project within Construction Cost Estimate.

## **2. SUBMISSION STANDARDS**

### **(a) Summary Format**

1. Elemental Analysis: All estimates shall be summarized in an agreed and consistent Elemental format. Several variations in format may be acceptable to PWGSC (by discussion) but those following the ASTM (USA), CIQS (CDN), CSI Unifformat II (USA) or BCIS (UK) formats are preferred.
2. Trade Summary: Where a trade summary is required, those following the Masterformat are preferred, except where local practice provides a more suitable alternative.
3. Project Cost Subdivision: The estimate shall isolate the costs of each phase of construction. All estimates within these phases shall further isolate and show separately the cost of individual building blocks and/or the accommodation sections listed here:
  - New construction
  - Renovation
  - Site work

## **PROJECT BRIEF**

---

### **(b) Media**

1. Provide three (3) hard copies of all reports including estimate summaries only and one (1) additional hard copy of the full report including the additional estimate support information to PWGSC.
2. One soft copy of the total estimate, summary and support detail, shall be provided on a CD or USB stick in an agreed format.

### **(c) Timelag**

Recognizing that estimates must follow the design decisions they represent, such estimates may lag. The cost portion of the Milestone Reports may follow, but by no more than two weeks unless otherwise determined by the Departmental Representative.

### **(d) Use of all available information**

The Cost Specialist is responsible for providing a complete cost estimate even though the information provided during the concept, design development and early working drawing stages is incomplete. Where requirements are not firmly defined, the Cost Specialist shall make assumptions, confirm them with the Stream 2 Consultant Team and either list them as assumptions, or have them incorporated in an outline specification modified by the Stream 2 Consultant Team.

## **3. TECHNIQUES:**

The Cost Specialist is required to be familiar with and make use of a broad range of cost techniques, especially the following:

### **1. Risk Analysis**

All construction estimates (except the final pre-tender estimate) shall include and identify design, estimating, inflation escalation and currency exchange allowances as are deemed necessary in light of the current information available. The Cost Specialist shall provide a satisfactory explanation of the level and/or amount of all such sums included within any estimate.

### **2. Scheduling**

The Cost Specialist shall assist the Time Specialist by providing building quantities, building systems information, and other quantifiable parameters deemed appropriate to the calculation of a reasoned project time schedule. The Time Specialist shall assist the Cost Specialist by maintaining an up-to-date schedule of all design activities along with an agreed bidding and Construction Schedule that will be incorporated by the Cost Specialist within the estimates on a timely basis.

### **3. Life Cycle Costing**

In advising the Stream 2 Consultant Team of the cost information for alternative materials, methods and systems, it is necessary that the Cost

## **PROJECT BRIEF**

---

Specialist uses all available information to ensure that a complete cost picture is made available, upon which design and construction decisions will be made.

#### **4. Continuing Estimate Process**

A process of continual adjustment of previous estimates may be used in place of total re-measurement at each milestone reporting point. This is acceptable, provided that at each monthly reporting point a full and up-to-date Elemental Cost Summary is provided by the Cost Specialist and that at each milestone reporting point this Elemental Cost Summary is supported by complete, detailed, stand alone back-up/support documentation, as previously described.

#### **5. Project Research**

The Cost Specialist shall visit the proposed or alternative construction sites to become familiar with site conditions, site access, etc., analyze local labour and material supply conditions, local bidding practices and competition to establish pricing levels. A written report detailing this reconnaissance activity is expected.

#### **6. Value Engineering/Management**

PWGSC may request a Value Engineering/Management Study to be undertaken. The Stream 2 Consultant Team will not be major players in this process, but shall answer questions and/or provide additional information called for by the Value Management team if requested to do so. The Cost Specialist shall assist the Value Management team by providing copies of the latest cost estimate and any additional cost information that may be required.

### **2.2.8.4 SERVICES - SPECIFIC ACTIVITIES (a) Project Analysis Stage**

The Cost Specialist may be required via a Task Authorization to review, report on, and propose revisions to an existing class "D" estimate. Do not proceed until the Departmental Representative has accepted the revised class "D" estimate.

The revised Class "D" cost estimate shall become the Construction Cost Plan.

#### **Concept Design**

A Class "C" estimate will be prepared by the Cost Specialist at the highest level of detail commensurate with the available information using elemental and additional detailed costs.

#### **Design Development**

Upon completion of design development, the Cost Specialist must prepare a Class "B" cost estimate representing the increased level of design detail available. The report shall be prepared using detailed (elemental) costs i.e. measured quantities with minimal allowances or lump sums.

## **PROJECT BRIEF**

---

Upon final acceptance by the Departmental Representative, the Class "B" cost estimate shall become the Construction Cost Plan.

### **Contract Documents**

During the production of the contract documents a process of continuing cost control progressively more detailed is required. At each review of contract documents, an up-to-date estimate shall demonstrate compliance with the Construction Cost Plan. Non-compliance with the Construction Cost Plan will require revisions to the contract documents.

### **Pre-Tender**

Upon completion of the contract documents, a pre-tender Class "A" cost estimate will be prepared by the Cost Specialist using 100% measured quantities.

The Cost Specialist must provide a trade breakdown of the pre-tender estimate for use in reviewing the submitted bids and the successful Contractor's estimate breakdown.

### **Tender Stage**

1. **Tender Award:** During the tender period, the Cost Specialist must examine and report on any cost impact created by the issue of tender/contract addenda. Incorporate the results of such addenda review into the final pre-tender estimate (both elemental and trade versions) prior to receipt of bids.
2. **Bid Review and Analysis:** The Cost Specialist must assist the Departmental Representative, as required, by analyzing and reconciling any differences between the pre-tender estimate and the submitted bids.
3. **Negotiation:** Should it be necessary to negotiate with any bidder prior to awarding the Contract, the Cost Specialist shall provide cost information as needed and enter into the negotiations if requested.
4. **Reconciliation:** Upon the signing of a contract with the successful Contractor, the Cost Specialist, if necessary, will reconcile both the elemental and trade estimates, in detail, with the agreed contract sum. These reconciled estimates will be used by the Construction Team during the construction phase of the project.

### **Cost Specialist Services through Construction**

During construction, the Cost Specialist shall assist the Construction Team with cost advice if requested.

Such activity may well encompass the following activities:

- Evaluation of change orders;
- Evaluation of claims;
- Evaluation of work completed;
- Evaluation of cash flow.



## **PROJECT BRIEF**

---

### **Post Contract**

The Cost Specialist may be required (via Task Authorization) to assist with the provision of details needed for an evaluation of the project, regarding the Project's cost performance.

### **2.2.8.5 RESPONSIBILITIES TO PWGSC**

The Departmental Representative will review all aspects of the Cost Specialist's work on a continuing basis to determine the validity and completeness of the information provided. In the event PWGSC identifies areas of concern including errors and omissions as well as areas of inadequate detail or areas that require further explanation, the Cost Specialist shall re-examine the estimates provided and make such revisions as are subsequently agreed to be necessary and/or provide ample acceptable evidence that such corrections or amendments are unnecessary.

- No Action Abrogates Consultant's Responsibilities.
- No acceptance or approval by PWGSC, whether expressed or implied shall be deemed to relieve the Cost Specialist, or the Consultant, of professional or technical responsibility for the estimates and cost reports.
- Neither does acceptance of an estimate by PWGSC in any way abrogate the Consultant's responsibility to maintain the agreed Construction Cost Plan throughout the life of the project, or the requirement to redesign should the lowest acceptable bid differ significantly from the agreed Construction Cost Plan, unless and until the Departmental Representative indicates otherwise in writing.

## **PROJECT BRIEF**

---

### **RS 2.2.9 RISK MANAGEMENT**

#### **2.2.9.1. INTENT:**

The Risk Specialist in collaboration with the Consultant shall provide support to the Departmental Representative in identifying risks throughout the project life cycle.

#### **2.2.9.2. SCOPE AND ACTIVITIES:**

- a. Identify risk events based on past experience and using proposed checklist (PWGSC and/or Consultant) or other available lists;
- b. Qualify/quantify probability of risk event (Low, Medium, High) and their impact (Low, Medium, High);
- c. Prioritize risk events (i.e. concentrate efforts on risk events with High probability and Medium to High impact);
- d. Develop risk response (i.e. evaluate alternatives for mitigation. This is the real added-value of risk management); and
- e. Implement risk mitigation.

#### **2.2.9.3. DELIVERABLES:**

- a. Prepare Risk Management Reports at Design Development, 66% Design Documents, and 100% Design Documents stages.
- b. Include input from all sub-consultants, and from Client/Users.
- c. Take steps to implement risk mitigation as required. This may include (but is not limited to) further recommendations, analysis, investigations, site meetings, site supervision, etc.

## **PROJECT BRIEF**

---

### **RS 2.2.10 CLOSURE REPORT**

If required in the TA, the Consultant shall submit closure reports comprising at a minimum the following:

1. Introduction:

- a. Project history.
- b. Scope of work.
- c. Description of design intent.
- d. Design development.
- e. Tendering process and award of contract.

2. Project implementation:

- a. Start - up meeting.
- b. Work plan and schedule of work.
- c. Field testing and quality control.
- d. Progress meetings and minutes.
- e. Site Instructions.
- f. Change orders.

3. Issues and difficulties encountered during implementation:

- a. Delays in the work.
- b. Lessons learned.

4. Conclusion and Summary.

5. List of Appendices:

- a. Copy of specifications.
- b. Contract drawings.
- c. List of subcontractors and suppliers.
- d. Digital photographs.
- e. As-built drawings (digital version).
- f. Record drawings and specifications.
- g. Post contract drawings.
- h. Any other drawings related to the project.
- i. Geotechnical report if applicable.
- j. Any environmental report.
- k. Any other report related to the project.

## **PROJECT BRIEF**

---

### **RS 2.2.11 AS BUILT DOCUMENTATION (DRAWINGS AND PHOTOGRAPHS) AND MEASURED DRAWINGS**

#### **2.2.11.1 INTENT:**

1. If required in the TA, the Consultant must review the field on a more frequent basis to record the as-built conditions during the construction, beyond what the Contractor will be submitting in the basic services. The specific scope is to be determined at time of Task Authorization.
2. The Consultant may be also requested to prepare measured drawings based from on-site measurements of an existing building or space. The purpose of these measured drawings "can be for a building to which additions or alterations will be made; or for spaces which are intended for lease and from which drawings, the areas for lease purposes will be calculated."
3. The request for this service may be part of the integrated design service or a stand-alone service.

#### **2.2.11.2 SCOPE AND ACTIVITIES:**

The Consultant shall:

1. Review the field, take photographs and measurements, as required, record the measurements and details.
2. For as-built conditions, confirm with the Contractor for the accuracy of the "as built" conditions during the construction.
3. Check and verify that all as-built conditions, to the best of his/her knowledge, are recorded accurately and completely. Request for photographs of the areas from the Contractor, prior to enclosing the areas.
4. Prepare as built drawings and measured drawings in AutoCad format as per "Doing Business with the National Capital Area (NCA)".

#### **2.2.11.3 DELIVERABLES:**

The Consultant shall provide:

1. As-built drawings
2. Photographs

## **PROJECT BRIEF**

---

### **RS 2.2.12 MATERIALS AND SYSTEMS TESTING**

The Consultant shall:

1. Prepare scope of work for procurement of testing services.
2. Procurement of Testing Services (i.e. concrete testing, review rebar installation, compaction testing, soil testing, domestic water line testing, sprinkler water line testing during construction).
3. Review Analysis of Testing:
  - a. Review results of testing and inform Departmental Representative of any impacts to the project.

Unless otherwise authorized by the Departmental Representative, Materials and Systems Testing shall be obtained through competitive bidding with a minimum of two (2) quotes. Copies of all quotes shall be submitted together with a completed Task Authorization for approval of the Departmental Representative. Competitive bidding is not required for Materials and Systems Testing not exceeding \$25,000, unless specifically requested by the Departmental Representative. The scope of services and minimum experience/qualification requirements of the sub-consultants providing these services will be specified in Task Authorizations, and will be evaluated by PWGSC with the submitted quotes provided. The selection of the sub-consultant will be made on the basis of best value for the Crown. For Materials and Systems Testing exceeding \$100,000, the Consultant must submit and obtain Departmental Representative's written approval of a procurement plan. This procurement plan must outline how the procurement will be conducted in a fair and open manner, should be written to respect Canada's trade agreement obligations to the closest extent possible, and should demonstrate how best value will be achieved.

## **PROJECT BRIEF**

---

### **RS 2.2.13      TECHNICAL COMPLIANCE / PEER REVIEWS / ADVISORY SERVICES**

The Consultant may be required via Task Authorization to review the design of a project or deliverable prepared by another consultant; to review a project built by a Contractor for compliance to specific standards; and/or to provide technical advisory services to PWGSC. The latter includes supporting PWGSC in conducting architectural design competitions as applicable for specific projects delivered using a Design-Bid-Build or Construction Management Approach (Note: for projects delivered using a Design-Build or AFP methodology, Consultant services would be tasked via Stream 3). The Consultant and his sub-consultants / specialists will be advised of the applicable standards, building codes and regulations at the time of the Task Authorization. The Consultant and his sub-consultants / specialists familiarity with the specific standards, building codes and regulations will be imperative.

Details of required services to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.2.14 OTHER ADDITIONAL SERVICES**

If required, any additional services will be identified at the time of each individual Task Authorization, and the Consultant will be responsible for the provision and management of these additional services.

Unless otherwise authorized by the Departmental Representative, these Additional Services shall be obtained through competitive bidding with a minimum of two (2) quotes. Copies of all quotes shall be submitted together with a completed Task Authorization for approval of the Departmental Representative. Competitive bidding is not required for Additional Services not exceeding \$25,000, unless specifically requested by the Departmental Representative. The scope of services and minimum experience/qualification requirements of the sub-consultants providing these Additional Services will be specified in Task Authorizations, and will be evaluated by PWGSC with the submitted quotes provided. The selection of the sub-consultant will be made on the basis of best value for the Crown. For Other Additional Services exceeding \$100,000, the Consultant must submit and obtain Departmental Representative's written approval of a procurement plan. This procurement plan must outline how the procurement will be conducted in a fair and open manner, should be written to respect Canada's trade agreement obligations to the closest extent possible, and should demonstrate how best value will be achieved.

## **PROJECT BRIEF**

---

### **RS 2.3 SPECIALIZED SERVICES**

The Consultant shall coordinate and manage Project or Task related specialized services, listed below, provided by Sub-Consultants and /or Specialists and required to complete project requirements in support of the requested services under a Task Authorization.

The Consultant may be required via a Task Authorization to provide any project related specialized services, either independently or as part of the overall scope of services as determined in the Task Authorization.

For each of the following services, the Consultant shall:

1. Prepare a written verification of project requirements that includes objectives, parameters, timelines and budget, with reference to roles and responsibilities, lines of communications, and submission requirements for approvals, presentations, reviews;
2. Attend meetings and record the issues, decisions and actions items (with responsibility) as discussed at each presentation and prepare and distribute minutes of the presentation within 72 hours;
3. Prepare and distribute status reports to the Departmental Representative at a frequency to be determined. Status reports must clearly identify any issues raised during the project, detailing the impacts on cost, risk and schedule for the project;
4. Implementation strategies that documents task/activities, milestones, process for information gathering, project goals and deliverables;
5. Ensure cost estimates commensurate with project requirements;
6. Prepare a final Document that consolidates all the requirements of the complete exercise with allowance for resubmission for final approval after predetermined reviews by the Departmental Representative.



## **PROJECT BRIEF**

---

### **RS 2.3.1 HERITAGE CONSERVATION ARCHITECT**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Heritage Conservation Architect to provide the architectural conservation advisory, design and/or construction oversight services for the specific project identified at the time of each individual Task Authorization.

The Consultant shall:

1. Review and coordinate the Heritage Conservation Architect's services required within the project parameters to meet the project objectives.
2. Coordinate with the Heritage Conservation Architect and the PWGSC Regional Heritage Coordinator the information and documentation required to be issued for review by Federal Heritage Building Review Office (FHBRO) as required.
3. Ensure that the PWGSC Regional Heritage Coordinator's and the FHBRO's recommendations are addressed on a timely fashion and are incorporated into the project deliverables.

The following is an example of a request for heritage conservation services where the Heritage Conservation Architect would be required:

#### **Scope, Activities and Deliverables:**

##### **1. Analysis Stage:**

Consultant shall review and report on, as a minimum, the following considerations:

1. Review existing documentation, such as existing heritage record drawings, Heritage Character Statement and Commemorative Integrity Statement as applicable;
2. Develop an inventory of heritage values and character-defining elements;
3. Prepare a condition report of the building elements that have heritage value;
4. Prepare a building envelope screening report;
5. Identify opportunities and strategies to minimize the impact of the proposed scope of work to the building heritage values and character defining elements;
6. Review and report on conservation objectives in relation to other project objectives and economic constraints;
7. Advise on potential archaeological concerns and proactive measures to maintain project schedule.

##### **2. Design Concept Stage:**

Consultant shall provide a Design Concept Report, including the following as a minimum:

1. Heritage Conservation Report with an analysis and options, including:

## **PROJECT BRIEF**

---

1. Conservation Design approach/ philosophy.
2. Statement of design principles for all disciplines.
3. Approach to the application of conservation policies and practices.
4. Approach to balancing the conservation objectives with other project objectives and economic constraints.
5. Identification of opportunities and strategies that limit the impact to the heritage character defining elements.
6. Analysis of intervention options against the most current edition of the Standards and Guidelines for Conservation of Historic Places in Canada.

### **3. Design Development Stage:**

Consultant shall provide a Design Development Report, including the following aspects to be included, as a minimum, are:

1. For proposed conservation treatments to the character-defining elements, demonstrate compliance with Standards and Guidelines for Conservation of Historic Places in Canada.
2. Identify opportunities and strategies that limit impact on the heritage fabric.
3. Develop conservation objectives in relation to other projects objectives and economic constraints.
4. Update the Heritage Conservation Report from the Design Concept Stage.

### **4. Construction Documents Stage:**

In collaboration with all relevant disciplines, the Consultant shall update and finalize the following:

1. Identification of opportunities and strategies that limit impact to the building heritage values.
2. Approach to balancing the conservation objectives with other project objectives and constraints.
3. Review proposed materials and construction methods, including for removals and reinstatement, to meet heritage conservation objectives.

Details of other required services relevant to heritage conservation are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.2 LANDSCAPE ARCHITECTURAL DESIGN**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Landscape Architectural Professional to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Landscape Architect's services required to meet project objectives within the project parameters.

Details of required services relevant to landscape architecture are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.3      GEOTECHNICAL ENGINEERING**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a geotechnical engineering consultant to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Geotechnical Engineer's services required to meet project objectives within the project parameters.

The following are some examples of the type of projects where the Geotechnical Engineer would be required:

1. Prepare scope of work for geotechnical engineering services on a particular project;
2. Recommend location of bore holes for the proposed building;
3. Review soil testing results and provide recommendations to the Departmental Representative.

Details of required services relevant to geotechnical engineering are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.4      CIVIL ENGINEERING**

If included in a Task Authorization, Consultant will be responsible for the management and coordination of a Civil Engineer to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the civil engineering services required to meet project objectives within the project parameters.

The following are some examples of the type of services where the Civil Engineer would be required:

1. Provide advice and design, contract documents for a specific project.

Details of required services relevant to civil engineering are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.5 BUILDING ENVELOPE SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Building Envelope Specialist to provide the advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Building Science Specialist's services required to meet project objectives within the project parameters.

The following are some examples of the type of projects where the Building Science Specialist would be required:

#### **1. Facade repair**

The Consultant shall prepare design and contract documents for the facade repair of existing buildings and for as-built design investigation of the building assembly. Cost estimates are to be provided with at least two design options for the facade treatment design.

The Consultant shall:

1. Prepare a written verification of project requirements that includes objectives, parameters, timelines and budget, with reference to roles and responsibilities, lines of communications, and submission requirements for approvals, presentations, reviews;
2. Attend meetings and record the issues, decisions and action items (with responsibility) as discussed at each presentation and prepare and distribute minutes of the presentation within 72 hours;
3. Prepare and distribute status reports to the Departmental Representative on a monthly basis. Status reports must clearly identify any issues raised during the project, detailing the impacts on cost, risk and schedule for the project.

#### **2. Roof replacement and green roof design (singly or in combination)**

The Consultant shall prepare contract documents for the repair or replacement of the existing roof with a new roof. In doing so, the Consultant shall ensure that appropriate recycling initiatives are undertaken, and that asbestos and other designated substances are properly removed and disposed of in accordance with provincial and federal standards and regulations. The Consultant shall ensure that contract documents reflect the existing conditions and include all roof penetration, roof curbs, roof venting, warranty, and R-value as appropriate for the site condition and functional requirements and operations of the facility and staff. Initial site reviews and building assessments are to be completed in order to determine conditions that affect current and future requirements.

The Consultant shall:

## **PROJECT BRIEF**

---

1. Select plant species to satisfy the structural capacity of the roof and the climatic requirement of the zone;
2. Attend meetings and record the issues, decisions and action items (with responsibility) as discussed at each presentation and prepare and distribute minutes of the presentation within 72 hours;
3. Prepare and distribute status reports to the Departmental Representative on a monthly basis. Status reports must clearly identify any issues raised during the project, detailing impacts on cost, risk and the schedule for the project.

### **3. Window repair and/or replacement**

The Consultant shall prepare contract documents for the repair and/or replacement of windows and all associated security screens and insect screens and shall also ensure proper recycling and disposal of associated materials.

The Consultant shall:

1. Ensure the repair and reinstating of all items affected in the window replacement process;
2. Provide Class D, C, B, and A estimates along with submissions and services as indicated in the appended document, "Doing Business with the National Capital Area (NCA)";
3. Attend meetings and record the issues, decisions and action items (with responsibility) as discussed at each presentation, and prepare and distribute minutes of the presentation within 72 hours;
4. Prepare and distribute status reports to the Departmental Representative on a monthly basis. Status reports must clearly identify any issues raised during the project, detailing impacts on cost, risk and the schedule for the project.

Details of required services relevant to building envelope are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.6 SUSTAINABLE DEVELOPMENT SPECIALIST**

PWGSC promotes an integrated approach from the earliest stages of a building project and may require consulting services to assist with meeting Sustainable Development Strategy (SDS) Targets and federal government policy requirements with respect to Greening Government Operations.

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a LEED accredited professional or equivalent to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization.

The Consultant shall review, integrate and coordinate the Sustainable Development Specialist's advice with the other disciplines and stakeholders to meet the requirements of the project.

The following are some examples of the scope of services where the sustainable design specialist would be required:

1. The Consultant shall prepare sustainable design requirements for existing and proposed projects that meet the environmental sustainable principles of the department/branch sustainable strategies;
2. Provide sustainable development advisory services to the Consultant Team;
3. Direct and provide integrated design service for implementation of LEED, Green Globe, BREEAM, Living Building Challenge (LBC) or BOMA Best targets;
4. Prepare energy efficiency and renewable energy studies;
5. Prepare water efficiency studies;
6. Prepare environmentally preferable building materials and specifications;
7. Implement the recommendations of the sustainability report prepared by others into the design and contract documents;
8. Assess the degree of compliance of a project with established legal requirements and policies;
9. Provide design recommendations to be incorporated into standard procedures, plans and specifications, action plans and/or environmental management plans, to ensure that the facility is designed, constructed and operated in compliance with applicable Legislation, standards and policies, and/or the project meets expected certifications;
10. Assemble and submit the required documentation of a building design project or a recently completed building for assessment and certification by LEED or Green Globe or BREEAM, LBC, BOMA Best.

Details of required services relevant to sustainable development are to be determined at the time of each individual Task Authorization.



## **PROJECT BRIEF**

---

### **RS 2.3.7 SMART/INTELLIGENT BUILDING SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Smart / Intelligent Building Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Smart / Intelligent Building Specialist services to meet project objectives required within the project parameters.

The following are some examples of the type of services where the Smart / Intelligent Building Specialist would be required:

1. Briefing sessions for PPB to inform various operational units of what Smart / Intelligent Buildings are and what could be considered on campus.
2. Functional Programing activities to work with various stakeholders so that requirement set with PPB's Smart / Intelligent Building program including both updated facilities and existing facilities.

Details of required services relevant to smart/intelligent building systems are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.8 CLIMATE CHANGE VULNERABILITY AND RISK ASSESSMENT SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Climate Change Vulnerability and Risk Assessment Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Climate Change Vulnerability and Risk Assessment Specialist services required to meet project objectives within the project parameters.

The following are some examples of the type of services where the Climate Change Vulnerability and Risk Assessment Specialist would be required:

1. Use of climate change modeling tools to develop projections in climate change expected.
2. Review of climate data and projected climate change models for analysis and recommendations.
3. Use of the PIEVC Protocol to identify and report on PPB vulnerabilities and risks at a campus level.
4. Translation of the climate change vulnerabilities and risks into design guidelines for our rehabilitation projects.
5. Translation of the climate change vulnerabilities and risks into operational guidelines for PPB's operations team when responding to extreme weather incidents.

Details of required services relevant to climate change vulnerability and risk assessment are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.9 GREEN/CLEAN TECHNOLOGY SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of various Green / Clean Technology Specialists to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization.

The Consultant shall review and coordinate the Green / Clean Technology Specialists services required to meet project objectives within the project parameters.

The following are some examples of the type of services where the Green / Clean Technology Specialists would be required:

1. Review of green / clean technologies to identify those that are market ready.
2. Review of green / clean technologies that should be accommodated within the next 15 to 50 years.
3. Studies related to the integration of green / clean technologies campus wide.
4. Specific and detailed review of a recommended technology including cost benefit analysis.

Details of required services relevant to green/clean technology are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.10 INFORMATION TECHNOLOGY / TELECOMMUNICATION SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of an Information Technology/Telecommunications Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization.

The Consultant shall review and coordinate the Information Technology/Telecommunications Services required to meet project objectives within the project parameters.

The following are some examples of the type of services where the Information Technology / Telecommunications Specialist would be required:

1. Provide advice and design for IT and telecommunication systems for interior fit-up spaces as part of the integrated design service or stand-alone service for a specific project.

Details of required services relevant to IT and telecommunications are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.11 BUILDING CODE SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Building Code Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Building Code Specialist services required to meet project objectives within the project parameters.

The following are some examples of the type of services where the Building Code Specialist would be required:

1. Provide advice on interpretation of the National Building Code and Ontario Building Code and the differences between the two codes.
2. Review sites and/or projects for conformance of building codes, federal standards and other standards related to building code issues.
3. Provide services related to building code interpretation as part of the integrated services for the project or stand-alone services to Federal Departments.

Details of required services relevant to building code expertise are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.12      MULTI-MEDIA SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Multi-media Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Multi-Media Specialist services required within the project parameters.

The following are some examples of the type of services where the Multi-media Specialist would be required:

1. Provide advice and specifications on type of multi-media equipment required for training and/or meeting rooms for a specific project.
2. Prepare concept layouts for procurement of equipment and special furniture related to multi-media performance.
3. Prepare contract documents for procurement and installation of equipment and special furniture related to multi-media.

Details of required services relevant to multi-media are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.13 ACOUSTIC SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of an Acoustic Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Acoustic Specialist's services required within the project parameters.

The following are some examples of the type of services where the Acoustic Specialist would be required:

1. Visit site and investigate the acoustical problem.
2. Provide advice on acoustics solutions to resolve a specific problem or incorporate into a design for a specific space or project.
3. Select acoustical products to meet a certain performance specification.

Details of required services relevant to acoustics are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.14      SECURITY SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Security Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Security Specialist services required to meet project objectives within the project parameters.

The following are some examples of the type of services where the Security Specialist would be required:

1. Provide advisory services on type of security hardware and security systems required to accommodate all levels of security operations.
2. Prepare a Threat and Risk Assessment (TRA) for a building.
3. Prepare a Security Design Brief for a project.

Details of required services relevant to security are to be determined at the time of each individual Task Authorization.



## **PROJECT BRIEF**

---

### **RS 2.3.15      SCHEDULING SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Scheduling Specialist to provide advisory services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Scheduling Specialist services required within the project parameters.

The following are some examples of the type of services where the Scheduling Specialist would be required:

1. Provide advisory services on staging and phasing of projects and their impact on the schedule.
2. Prepare construction schedules for cost estimating purposes.

Details of required services relevant to scheduling are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.16 FOOD SERVICE / KITCHEN CONSULTANT**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Food Service / Kitchen Consultant to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Food Service / Kitchen Consultant services required to meet project objectives within the project parameters.

The following are some examples of the type of services where the Food Service / Kitchen Consultant would be required:

1. Visit site and assess condition of kitchen equipment for functionality and compliance with latest codes and standards;
2. Provide advisory services on replacement or improvements to the existing food services and kitchen equipment;
3. Provide conceptual layouts and cost estimates for budget purposes to enable client to procure kitchen equipment.
4. Prepare tender documents and specifications.

Details of required services relevant to food service/kitchen expertise are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.17      VERTICAL TRANSPORTATION SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Vertical Transportation Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the vertical transportation specialist services required to meet project objectives within the project parameters.

The following are some examples of the type of services where the vertical transportation specialist would be required:

1. Provide advisory services on the condition of the existing elevators.
2. Assess existing elevators for conformance to latest codes and standards.
3. Prepare performance-based specifications for proposed elevators.

Details of required services relevant to vertical transportation are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.18 WAYFINDING AND SIGNAGE SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Wayfinding and Signage Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the wayfinding and signage specialist services required to meet project objectives within the project parameters.

The following are some examples of the type of services where the Wayfinding and Signage Specialist would be required:

1. Provide design services for wayfinding and signage for existing and/or proposed projects.
2. Prepare proposals for procuring signage.

Details of required services relevant to wayfinding and signage are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.19 ROOFING SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Roofing Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization.

The Consultant shall review and coordinate the Roofing Specialist services required to meet project objectives within the project parameters.

The following are some examples of the type of services where the Roofing Specialist would be required:

1. Assess the condition of existing roofs and prepared condition report.
2. Provide design documents for a proposed roof repair or replacement.

Details of required services relevant to roofing are to be determined at the time of each individual Task Authorization.

### **RS 2.3.20 TRAFFIC SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Traffic Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization.

The Consultant shall review and coordinate the Traffic Specialist services required to meet project objectives within the project parameters.

Details of required services relevant to traffic consulting are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.21 BUILDING INFORMATION MODELLING (BIM) SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Building Information Modelling Specialist to provide advisory and/or design services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Building Information Modelling Specialist services required to meet project objectives within the project parameters.

Details of required services relevant to BIM are to be determined at the time of each individual Task Authorization.

### **RS 2.3.22 LIGHTING SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Lighting Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Lighting Specialist services required to meet project objectives within the project parameters.

Details of required services relevant to lighting specialty are to be determined at the time of each individual Task Authorization.

### **RS 2.3.23 HARDWARE DESIGN SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Hardware Design Specialist to provide advisory, design and/or construction oversight required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Hardware Design Specialist services required to meet project objectives within the project parameters.

Details of required services relevant to hardware design are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.24      MOVE COORDINATION SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Move Coordination Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization.

The Consultant shall review and coordinate the Move Coordination Specialist services required to meet project objectives within the project parameters.

Details of required services relevant to move coordination are to be determined at the time of each individual Task Authorization.

### **RS 2.3.25      INDIGENOUS AFFAIRS SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of an Indigenous Affairs Specialist to provide advisory services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Indigenous Affairs Specialist services required to meet project objectives within the project parameters.

Details of required services to be determined at the time of each individual Task Authorization.

### **RS 2.3.26      BLAST ENGINEERING SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Blast Engineering Specialist to provide advisory, design and/or construction services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Blast Engineering Specialist services required within the project parameters.

Details of required services relevant to blast engineering are to be determined at the time of each individual Task Authorization.

## **PROJECT BRIEF**

---

### **RS 2.3.27 URBAN PLANNING AND DESIGN SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of an Urban Design and Planning Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization.

The Consultant shall review and coordinate the Urban Planning and Design Specialist services required to meet project objectives within the project parameters.

Details of required services relevant to urban planning and design are to be determined at the time of each individual Task Authorization.

### **RS 2.3.28 PUBLIC CONSULTATION SPECIALIST**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of a Public Consultation Specialist to provide advisory services required for the specific project identified at the time of each individual Task Authorization. The Consultant shall review and coordinate the Public Consultation Specialist services required to meet project objectives within the project parameters.

Details of required services relevant to public consultation are to be determined at the time of each individual Task Authorization.

### **RS 2.3.29 INDUSTRIAL ENGINEERING/MATERIAL HANDLING LOGISTICS**

If included in a Task Authorization, the Consultant will be responsible for the management and coordination of an Industrial Engineering/Material Handling Specialist to provide advisory, design and/or construction oversight services required for the specific project identified at the time of each individual Task Authorization.

The Consultant shall review and coordinate the Industrial Engineering/Material Handling Specialist services required to meet project objectives within the project parameters.

Details of required services relevant to industrial engineering are to be determined at the time of each individual Task Authorization.



## **PROJECT BRIEF**

---

### **RS 2.3.30 OTHER SPECIALIZED SERVICES**

If required, any other specialized services, in addition to the services provided under Basic Services and Additional Services, will be identified at the time of a Task Authorization, and the Consultant will be responsible for the provision, management and coordination of these Specialized Services.

Unless otherwise authorized by the Departmental Representative, these Specialized Services shall be obtained through competitive bidding with a minimum of two (2) quotes. Copies of all quotes shall be submitted together with a completed Task Authorization for approval of the Departmental Representative. Competitive bidding is not required for Specialized Services not exceeding \$25,000, unless specifically requested by the Departmental Representative. The scope of services and minimum experience/qualification requirements of the sub-consultants providing these Specialized Services will be specified in Task Authorizations, and will be evaluated by PWGSC with the submitted quotes provided. The selection of the sub-consultant will be made on the basis of best value for the Crown. For Other Specialized Services exceeding \$100,000, the Consultant must submit and obtain Departmental Representative's written approval of a procurement plan. This procurement plan must outline how the procurement will be conducted in a fair and open manner, should be written to respect Canada's trade agreement obligations to the closest extent possible, and should demonstrate how best value will be achieved.

## **PROJECT BRIEF**

---

### STREAM 3 REQUIRED SERVICES

#### 1.0 INTRODUCTION

Consultant shall provide all the required services listed in this Stream 3 Required Services section either as part of their in-house expertise and/or a combination of in-house resources and sub-consultants/specialists. Specific services will be identified in each Task Authorization.

#### 2.0 SCOPE OF SERVICES

Task Authorizations may include any or all of the following advocate architect services. Specific services will be identified and customized to suit particular requirements in each Task Authorization.

- RS 2.1 Phase 1 – Pre-Procurement
- RS 2.2 Phase 2 – Procurement
- RS 2.3 Phase 3 – Design & Construction
- RS 2.4 Phase 4 – Post-Construction

## **PROJECT BRIEF**

---

### **RS 2.1 Phase 1 – Pre-Procurement**

In Phase 1, the Consultant must assist PWGSC in the initial site planning as described below, and by establishing design performance characteristics and specifications (i.e. constraints and requirements).

Phase 1 deliverables must consist of preliminary site drawings, stakeholder engagement program, reference concept design, Technical Requirements/Design Guidelines/Project Specific Output Specifications (PSOS) and performance standards. The Consultant must undertake substantial development of both the Reference Concept and the PSOS to the level required to support preparation of a Class C cost estimate for the Cost Consultant appointed and contracted for separately by PWGSC.

The Consultant will allow for review and input by PWGSC on all draft documents at 30%, 60% and 90% milestones (unless otherwise specified in TA), and must revise all draft documents to satisfy those reviews at each stage.

Timelines for the provision of one or more of the deliverables identified above may necessarily extend into Phase 2, with prior approval of the Departmental Representative.

The Consultant will support PWGSC during the development of the Procurement Option Analysis by providing professional opinions on various risks (e.g., environmental, design development, site conditions). The Consultant will provide input to the risk matrix and actively participate in risk workshops. The Consultant will also support PWGSC during the development of key pre-procurements activities, such as PWGSC approval documents, various workshops and procurement preparation, as defined in Task Authorizations.

The Phase 1 primary tasks are described below.

#### **RS 2.1.1 Stakeholder Engagement**

- a. The Consultant's scope includes leading user groups and stakeholder consultations on behalf of PWGSC, to support the subsequent development of the Functional Program and PSOS and the development approvals process.
- b. The Consultant's scope of services will include working closely with PWGSC to schedule, organize and conduct user group and key stakeholder sessions to ensure that requirements are addressed in the Site plan, Reference Concept, and design and facilities management performance specifications. The Consultant will incorporate and respond on the behalf of PWGSC to feedback generated by engagement activities.
- c. Stakeholder and user groups that will need to be consulted will include, but are not limited to: PWGSC subject matter experts, PWGSC, Justice Canada, City of Ottawa, FHBRO, Senate, House of Commons, indigenous groups, Parliamentary Protective Services (PPS), PPB Facility Management, etc. Stakeholders will be identified at the time of the Task Authorizations.

The user group and stakeholder consultations are intended to ensure an

## **PROJECT BRIEF**

---

understanding of user and stakeholder functional, operational and design requirements for the Project.

### **RS 2.1.2 Document Review and Data Collection**

- a. The Consultant's first task in Phase 1 is to review and validate all existing due diligence studies completed on the project (e.g. geotechnical reports, environmental reports, strategic papers, functional program, early technical studies, etc.) to identify information gaps and make recommendations to PWGSC as to whether additional studies are required prior to issuance of the RFQ.
- b. If the Departmental Representative agrees that additional studies are needed, the Consultant will oversee the completion of these studies to be procured by PWGSC.

### **RS 2.1.3 Initial Site Drawings for the Site**

- a. Using available site information, the Consultant will provide initial site drawings for the Project that will (unless otherwise agreed in TA) include the following deliverables:
  1. Three (3) phasing options for site servicing and surface development for all or a portion of site services for the site, including:
    - i. Internal roadway and parking requirements, standards and guidelines for proposed future developments, including capacity, alignments, entrances, access and standards;
    - ii. connections and infrastructure requirements to tie into adjacent urban bike and pedestrian pathway systems; and
    - iii. considerations or requirements for alternative transportation including transit, shuttle services, automobile (including van and carpool as required) parking, alternative fuel vehicles charging stations and secure bike storage;
  2. A Development Site Servicing Plan (DSSP) suitable for approval by PWGSC and stakeholders, to include the phased development for all or a portion of site services for the site based on the option chosen by PWGSC including:
    - i. Deep services - sewer, storm and water systems; include internal sanitary sewer system alignments, the main sanitary sewer line, internal water distribution system alignments and the main water line connections to the existing City of Ottawa sanitary sewer and water line system; and
    - ii. Shallow services - gas, telecommunications, fibre optics, electrical power and connections to the City of Ottawa's utility service grid;

## **PROJECT BRIEF**

---

3. A storm water management plan suitable for approval by the City of Ottawa and the development of a comprehensive storm water management system, based on existing storm water management plans and incorporating new designs;
4. A preliminary LEED® certification plan (or other recognized sustainability certification program) and checklist related to site development targeting the project-specific certification level selected.
6. The initial site plan for the Project must allow for phased approaches to implementation, and should address the following development considerations:
  - Zoning: size, height, setbacks, coverage, parking, landscaping, signage;
  - Topography: contours, physical features, access, vegetation, water;
  - Climate: wind, solar orientation, temperature, humidity, precipitation;
  - Geotechnical: surface soil, subterranean soils, seismic, environmental hazards;
  - Environmental: water, fish and wildlife, reserve lands;
  - Snow drifting potential and mitigation measures;
  - Utilities: water, electricity, gas, phone and data, cable, sanitary, storm, fire protection;
  - Vicinity: area structure plan, amenities, noise, view, community goals and concerns;
  - Functional adjacencies and process flows associated with proposed future developments;
  - Community services: fire, police, emergency medical services, waste, snow removal; and
  - On-site traffic data and access points criteria: service vehicles, emergency vehicles, pathway connectivity, pedestrian access, and parking requirements for employees, visitors, and handicapped users.

### **RS 2.1.4 Project Reference Concept**

- a. PWGSC has previously commissioned functional program reports to various levels of detail, related to the redevelopment of the Parliamentary Precinct, which will be made available to the Consultant. To the extent needed to supplement the information provided in the Functional Program Reports, the Consultant shall initiate and lead consultation meetings with Senate, House of Commons, indigenous representatives, PWGSC's functional experts to ensure the Consultant has a full understanding of the functional requirements. The PWGSC Departmental Representative shall assist in arranging such consultation meetings the Consultant requires.
- b. The Consultant to prepare a Reference Concept for the Project to test, refine and demonstrate PSOS. The Reference Concept is expected to consist of partial

## **PROJECT BRIEF**

---

schematic documents including three (3) alternative layout plans incorporating scaled and colour-coded diagrams to identify and differentiate all program areas, roadways, parking, primary circulation patterns, service spaces, and entrances and exits. Plans must include a layout of each floor plate showing each discrete functional space, and building elevations to illustrate theoretical massing. Narratives are to be included to explain the blocking and massing concepts and assumptions. The text and diagrams together should permit a full understanding of the schemes.

c. The Reference Concept will expand on the Functional Program Report to achieve the following:

- Provide understanding by the user groups and PWGSC of the required synergies of the building program;
- Identify operational assumptions, and planning and design principles (such as component organization, a proximity matrix, circulation systems, security, sustainability requirements);
- Illustrate functional and spatial relationships;
- Enable the building and site program to be tested to ensure that the program with all its intended spatial and programming relationships can be physically achieved;
- Provide a sufficient level of detail for exterior elevations to inform stakeholder groups concerned with the external appearance and interface impacts of the future project;
- Enable the building and site program to be analyzed with respect to the requirements of all relevant building codes and Authorities Having Jurisdiction;
- Demonstrate that a massing concept can function within the gross building area allowance; and
- Serve as the initial step towards the production of the design and facilities management performance specifications, and allow design impacts on the building and site program to be uncovered in the block diagram stage prior to approval of the recommended program.
- NOTE: The Reference Concept is intended to provide guidance for the facility designs that will be prepared by the AFP RFP proponents, without prescribing a particular design solution.

d. The layout plans are to include:

- Individual floor plans;
- Structural system details, including structural grid and column locations; and
- Mechanical and electrical floor plans, including location and basic layout of equipment and preliminary sizing; and routing of main feeds and associated shafts and risers; single-line diagrams at a scale not less than 1:200.

## **PROJECT BRIEF**

---

- e. The Reference Concept produced by the Consultant is to be developed to a 30% level of design.
- f. In preparing the concepts, the Consultant is required to make assumptions, based on its professional design expertise and its knowledge of industry best practices, on the types of building systems appropriate to the project including the impact of architectural, structural, mechanical and electrical components on the program layout (e.g. electrical rooms, IT hub rooms, FM spaces).
- g. The Consultant may be required to produce enhanced schematic drawings of certain limited building areas where specialized layout, furnishings, fixtures or equipment, adjacencies, components or finishes may be critical to PWGSC and the clients and need to be illustrated to the AFP Proponents. These need for enhanced schematic drawings will be identified in Task Authorizations.

### **RS 2.1.5 Refined Cost Estimate**

- a. The Consultant will be required to review the design parameters and the initial functional space program and provide design and specification information to permit the development of a refined cost estimate (including capital, operational and lifecycle components) for the Project by a Cost Consultant to be contracted for separately by PWGSC.
- b. The level of classification required for the capital cost estimate will be Class C.
- c. If the estimate exceeds the PWGSC budget, the Consultant must make adjustments to the specifications and functional space program, in consultation with PWGSC, to reduce the estimated cost to within the Project budget.

### **RS 2.1.6 Technical Requirements/Design Guidelines/Project Specific Output Specifications (PSOS)**

- a. The Consultant's scope includes developing and producing the Technical Requirements/Design Guidelines/Project Specific Output Specifications (PSOS) for inclusion in the AFP Contractor RFQ, RFP and Project Agreement. In the case of some Projects, Technical Requirements/Design Guidelines/PSOS have been prepared by separate consultants engaged by PWGSC, which will require validation and updating by the Consultant. These requirements will be identified in the Task Authorizations.
- b. The technical requirements governing the design, construction and Facility Management of the Project will be set out in the PSOS. Through its compliance with the PSOS prepared by the Consultant, the AFP Contractor will be able to design, construct, operate and maintain buildings that meets PWGSC's needs and objectives with respect to such buildings, including the expectations for functionality,

## **PROJECT BRIEF**

---

serviceability, reliability and durability established by PWGSC. The PSOS will be used as a point of reference to evaluate the designs and technical submissions submitted by the AFP Proponents, and the PSOS will be included in the Project Agreement.

- c. The PSOS will allow for lifecycle cost analysis of all major building components and engineered building services by the Cost Consultant. The PSOS must include design performance specifications and/or facility management performance specifications, subject to the delivery model selected for a particular Project.

### **1. Design and Construction Performance Specifications**

- .i The Consultant must prepare the Design and Construction Performance Specifications portion of the PSOS that will form an integral part of the AFP Contract RFP document issued to the AFP Proponents.
- .ii The Design and Construction Performance Specifications will define performance levels for all building systems and components that are consistent with the final building and site program's specific requirements and support services, including but not limited to:
  - Site – including roads, pathways, parking, lighting, drainage, landscaping, fencing, etc.;
  - Building rooms and components including: Parliamentary Office Units, Committee Rooms, loading dock, reception / public access area, offices, support rooms, security and information technology rooms;
  - Washrooms and locker rooms, meeting rooms, lunchrooms, vaults;
  - Physical attributes within spaces;
  - All required dimensions within the planned space;
  - The physical quality, functionality, capacity, material, durability, serviceability, lifespan, and sustainability requirements of the spaces and contained or contributing components;
  - Landscaping, storm water;
  - Architectural walls, ceilings, floors, doors, glazing, hardware and acoustic control;
  - Building envelope;
  - Structural capacity and serviceability;
  - Ventilation, heating, cooling, humidification, filtering, pressurization, contaminants control, plumbing, controls;
  - Power distribution and quality, lighting, life safety, data, communication and security systems, controls;
  - Fixed furniture, equipment, millwork and casework;
  - Space templates and space data sheets;
  - Sustainable Design;
  - Heritage conservation requirements; and
  - Applicable codes, standards, and guidelines;



## **PROJECT BRIEF**

---

- .iii The Design and Construction Performance Specifications must be consistent with all applicable building codes and other standards and guidelines as determined by Authorities Having Jurisdiction.
- .iv The Consultant must ensure that Design and Construction Performance Specifications maintain and enhance the opportunities for flexibility and adaptability within each component, and allow for current and future best practices for service delivery.

### **2. Facility Management Performance Specifications**

- .i As deemed appropriate, in instances where an FM component is to be included in the AFP Projects (as determined in the Task Authorization), the Consultant will be required to develop the Facility Management Performance Specifications portion of the PSOS that will form an integral part of the RFP document to be provided to AFP Proponents.
- .ii The Consultant will assist with the development of the key performance indicator framework (as defined in the Task Authorizations) that encompasses a performance incentive / penalty regime that will govern the AFP Contractor performance throughout the term of the contract. This framework will be included in the AFP Project Agreement.
- .iii The scope includes working coordination with the Design Performance Specifications to optimize design and operational requirements. In addition, the Consultant will work with PWGSC and other stakeholders and consultants to ensure integration of the Facility Management Performance Specifications with other elements of the PSOS and the Project Agreement.
- .iv The Facility Management Performance Specifications must ensure the provision of the necessary services and service levels to PWGSC so it can achieve its core objectives. The specifications must also optimize the operating, maintenance and lifecycle costs of the Project over the duration of the Project Agreement with the AFP Contractor; including but not necessarily limited to:
  - General integrated management of all Facilities services;
  - All operational and tenant related services, including cleaning, waste management and removal, grounds, pest control, parking management, ad hoc services, etc.;
  - All maintenance and repair services, including preventive, corrective, predictive services; and
  - Lifecycle replacement/refurbishment services.
- .v The Facility Management Performance Specifications must provide processes for reporting, annual review and reforecasting of facility

## **PROJECT BRIEF**

---

management costs, including utilities, operating staff, and building service contracts by the AFP Contractor.

- .vi Attend meetings on the Project Agreement as needed for review and discussion. Work with legal advisors to ensure consistency of terminology definition, address specific issues or suggested language changes, etc.
- .vii Based on discussion and issues identification, propose language, changes, items to consider, do research when necessary and write recommendations for PWGSC with rationale, etc. as needed to enable decision making.

### **RS 2.1.7 Fundamental Commissioning Authority**

- a. The Consultant will analyze the proposed Project objectives and constraints, and make a recommendation, with detailed justification, to PWGSC on the most appropriate sustainability certification program to adopt for the Project, as well the level of certification that should be pursued (e.g. LEED: Certified, Silver, or Gold) in order to meet PWGSC's sustainability requirements.
- b. PWGSC will engage and manage the Fundamental Commissioning Authority for the project. The Consultant will advise and support PWGSC in the development of the Fundamental Commissioning Authority's scope of services and the review and oversights of their services.

**NOTE:** all certification processes except for the Fundamental Commissioning Authority, including drafting and managing all submissions to the selected sustainability program organization, are the responsibility of the AFP Contractor.

### **RS 2.1.8 Permits and Approvals**

- a. The Consultant's scope includes detailing all of the steps and requirements in the RFP Performance Specifications to allow the AFP Contractor to apply for and obtain Site Plan Approval from the City of Ottawa.
- b. The Consultant will review all technical reports pertaining to the Project site and will obtain additional information as required to develop indicative site and building plans, as well as supporting documents that will be used to:
  - Demonstrate adherence to all relevant provincial and federal regulations;
  - Obtain required federal and provincial permits and approvals;
  - Acquire municipal approvals, permits and licenses; and
  - Engage stakeholders.
- c. To satisfactorily address the character and approval requirements of the site plan, the supporting documents must:
  - Outline the purpose and scope of the project, including justification, project alternatives and existing conditions;

## **PROJECT BRIEF**

---

- Identify infrastructure and service requirements;
- Identify site-specific constraints (e.g. tunnel infrastructure);
- Incorporate geotechnical investigation and reports, by a geotechnical engineering consulting firm to supplement, if required, the existing geotechnical information, to determine general geotechnical design parameters and facility placement on site;
- Identify project activities that may impact environmentally sensitive areas;
- Identify mitigation measures to be used to reduce impacts;
- Determine the significance of any residual environmental effects;
- Incorporate environmental investigation and reports, by an environmental consulting firm to supplement if required, the existing environmental information, to determine environmental damage mitigation or replacement in sensitive site areas; and
- Develop surveillance and monitoring measures.

### **RS 2.1.9 Document Preparation**

As part of document preparation, the duties of the Consultant shall include but not necessarily be limited to:

- AFP Contractor RFQ Document:** Develop the AFP Contractor RFQ documents with input from PWGSC;
- AFP Contractor RFP Document:** Develop the AFP Contractor RFP documents, including preparing technical components of the Project Agreement and Schedules, assisting in the population and review of materials in the data room to support the AFP Contractor procurement process and drafting (and amending as necessary) the PSOS that will be included with the AFP Contractor RFP documentation and form part of the Project Agreement;
- Evaluation Criteria and Submission Requirements:** Development of proposal requirements, detailed evaluation criteria and evaluation methodology of the design, construction and project management sections for the evaluation, selection and negotiation stages of the AFP Contractor RFP;
- Project Agreement:** Generation of content for sections of the Project Agreement including, as applicable, site description; design review procedures for schematic design, design development and construction document submissions; moveable furniture, furnishings and equipment; cash allowance procedure; and requirements for commissioning, completion and occupancy processes (this advisory service will primarily involve modifications to the existing template Project Agreement); and addressing PA issues requiring input from the Consultant, including attending meetings and drafting text; and

## **PROJECT BRIEF**

---

- e. **Cash Allowances:** Working with PWGSC to identify cash allowances for any Facility elements or systems, furnishings, fixtures and equipment, demolition, construction or decanting procedures or other aspects which cannot be accurately defined in the AFP Contractor RFP at the time of issuance.

## **PROJECT BRIEF**

---

### **RS 2.2 Phase 2 – AFP Procurement**

In Phase 2, the Consultant will assist PWGSC throughout the AFP procurement process with advice and support related to the design, construction and/or facilities management (as applicable) of the Project, as requested, including:

- a. Preparing responses to questions and information requests from respondents to the AFP Project RFQ and the AFP Project RFP;
- b. Assisting with the development of communications;
- c. Assisting with technical submission evaluations under the AFP Project RFP; and
- d. Advising on the selection of excerpts from the AFP Contractor's proposal to be included in the Project Agreement.

#### **RS 2.2.1 TENDER PERIOD**

During the period in which the AFP Project RFP is posted on [Buyandsell.gc.ca](http://Buyandsell.gc.ca) and AFP Proponents are preparing their proposals, the duties of the Consultant will include but may not be limited to:

- a. AFP Proponent Meetings: Participating in AFP Proponent meetings including commercially confidential meetings to discuss project scope to assist them in interpreting and understanding the AFP Contractor RFP documents prepared by the Consultant;
- b. Addenda to AFP Contractor RFP Documents: Providing consultation and advice to PWGSC as required regarding addenda to the AFP Contractor RFP documents resulting from the commercially confidential meetings and other communication with AFP Proponents;
- c. Design Consultations: Assisting PWGSC with design consultations with the AFP Proponents and providing written documentation of the design feedback process detailing all compliance issues;
- d. Architectural Design Competition (as applicable): Assisting PWGSC in conducting an architectural design competition as applicable for specific Projects, as part of the procurement process. This includes developing the competition framework and evaluation criteria, and assisting PWGSC in structuring and managing the evaluation of the design competition submissions; and
- e. AFP Proponent Question and Answer Process: Assisting PWGSC in the preparation and communication of responses to AFP Proponent questions throughout the procurement process, including drafting responses to questions relating to design, construction and FM. Create addenda and make any required amendments to specifications based on RFI responses where changes are agreed.

## **PROJECT BRIEF**

---

### **RS 2.2.2 Proposal Evaluation Process**

The Consultant will assist PWGSC's selection committee with the technical evaluation of submissions received by AFP Proponents.

As part of the evaluation process, duties of the Consultant shall include but may not be limited to:

- Assisting with evaluation of AFP Proponent's Submissions: Assisting PWGSC with the technical evaluation of the AFP Proponent submissions including reviewing for compliance and identifying any variances to PSOS;
- Assisting with evaluation of Innovation in Proposals: Evaluating innovations in AFP Proponent proposals and advising PWGSC as to the acceptability of such proposals and their potential value;
- Technical Analysis Report: Preparing a detailed report of the results of the technical analysis of Proposals (with a focus on functionality) for presentation to, and review by, the selection committee including a detailed analysis as to whether the Proposal (i) does not meet, (ii) meets, or (iii) exceeds the AFP Contractor RFP's technical requirements, and supporting rationale for those conclusions;
- Supporting PWGSC in conducting architectural design competitions as may be applicable to specific projects; and
- Support Construction and FM Costs Review: Assisting PWGSC with review of the AFP Proponents' construction and FM (as applicable) cost submissions to assess the quality and completeness of pricing.

### **RS 2.2.3 Selection and Negotiation Stage**

As part of the selection and negotiation process, the duties of the Consultant will include but may not be limited to:

- Technical Support: Providing technical support for contract negotiations with the AFP Preferred Proponent, through to commercial close and financial close, including attending required meetings as determined by PWGSC;
- Debriefing: Supporting PWGSC in preparing for debriefing sessions with the unsuccessful Proponents and participating in lessons-learned sessions with PWGSC at the conclusion of the selection process; and
- Final documentation: Assisting with discussions related to design, construction and FM specifications (as applicable) as a result of negotiations or changes negotiated with the Preferred Proponent. Assessing and identifying impacts to specifications, making recommendations, making drafting changes to technical documentation. Attending periodic project review meetings and ad-hoc meetings as needed.

## **PROJECT BRIEF**

---

### **RS 2.3 Phase 3 – Design and Construction**

Services in this phase will be conditional upon Canada's decision to award a contract to a recommended AFP proponent.

Assuming Contract Award is completed, as part of the post-Financial Close process, the Consultant must assist PWGSC in reviewing the AFP technical contract documents and in carrying out PWGSC's monitoring and oversight responsibilities during construction. The Required Services comprise the following components: design review and approval; construction oversight and monitoring, including quality management.

#### **RS 2.3.1 Design Review and Approval**

The Consultant must review the AFP Contractor's submissions at the following stages: (a) schematic design, (b) design development, (c) construction documents, and (d) commissioning, completion and occupancy stages. Reviews must be interactive with the AFP Contractor and need to adhere to fast turnarounds for reviews to ensure the construction schedule is not delayed.

In undertaking these reviews, the Consultant must identify areas of technical non-compliance with the PSOS and Project Agreement including but not limited to the following items; drawings, specifications, functional requirements, room finish schedules, commissioning program, completion plan, occupancy plan, proposed project schedule, sustainable design strategy; and strategy for sequential building permit approvals.

The Required Services that the Consultant is to undertake as part of this phase is detailed as follows:

##### **RS 2.3.1.1 SCHEMATIC DESIGN**

The Consultant will lead certain aspects of the review of the AFP Contractor's schematic design submissions, including but not necessarily limited to the following items:

- Reviewing AFP Contractor document submissions for consistency with the design and technical requirements;
- Conducting day-to-day submission reviews and feedback on behalf of PWGSC to ensure compliance with the design requirements;
- Undertaking fundamental commissioning authority review;
- Reviewing technical non-compliance lists as required for this stage; and
- Reporting to PWGSC detailing the schematic design process and acknowledging schematic design acceptance.

##### **RS 2.3.1.2 DESIGN DEVELOPMENT**

The Consultant is to lead all aspects of the review of the AFP Contractor's design development submissions, including the following items:

## **PROJECT BRIEF**

---

- Conducting day-to-day submission reviews and feedback on behalf of PWGSC to ensure compliance with the design requirements;
- Undertaking sustainability-commissioning plan development and implementation through the fundamental commissioning authority;
- Developing technical non-compliance lists as required during this stage;
- Reporting to PWGSC detailing the design development process that includes a detailed opinion as to whether the design development is in compliance with the detailed PSOS and is acceptable.

### **RS 2.3.1.3 CONSTRUCTION DOCUMENTS**

The Consultant must lead all aspects of the review of the AFP Contractor's construction document submissions, including the following items:

- Reviewing AFP Contractor construction document submissions with the design requirements, including review of selected shop drawings for consistency;
- Incorporating sustainability commissioning requirements into the construction documents through the LEED fundamental commissioning authority;
- Developing technical non-compliance lists as required during this stage;
- Developing preliminary sustainability program design submission by the AFP Contractor to the sustainability certification organization, and participating in the AFP Contractor's preliminary sustainability program design review process with the sustainability certification organization; and
- Reporting to PWGSC in detail regarding the construction documents process, including the provision of a detailed opinion as to whether or not the construction documents submitted by the AFP Contractor are in compliance with the detailed PSOS and are acceptable.

### **RS 2.3.2 Construction Oversight and Monitoring**

During the construction stage, the Consultant must monitor the progress of the Project, including the provision of following services:

- Providing periodic on-site review visits during construction to review conformance with the contract documents for construction and progress of the project works, and submitting periodic reports;
- Providing reviews of any periodic submittals provided by the AFP Contractor necessary to assess the progress of the project works, as required and as determined by PWGSC throughout the assignment, and report results of such reviews to PWGSC;
- Reviewing shop drawings, construction quality reports, deficiency reports, and proposed substitutions and other value engineering proposals from the PWGSC Contractor;
- Reviewing any variation, change, addition, deletion, substitution, or omission to the project works, which will increase or decrease costs of completing the



## **PROJECT BRIEF**

---

project works or will cause material delay in completing the project works or affect conformance with the PSOS, and provide recommendations to PWGSC;

- Providing technical content for all notices of change;
- Responding to requests for information from the AFP Contractor within 10 days or according to a timeframe that has been approved by the Departmental Representative;
- Reviewing the AFP Contractor's quality management system to confirm that requirements on quality control and quality assurance for all engineering, architectural and construction components are satisfactory;
- Making recommendations for non-destructive, destructive or invasive testing of construction work as required;
- Reviewing construction mock-ups and adjustments;
- Ensuring the consistency of the preliminary AFP Contractor commissioning plan, completion plan and occupancy plan with the Project Agreement, including the design requirements;
- Review the final AFP Contractor commissioning program;
- Verify installation and performance of LEED-commissioned systems through the LEED fundamental commissioning authority;
- Produce a summary LEED-commissioning report through the LEED fundamental commissioning authority;
- Provide oversight of commissioning services to test, verify and prove that system performance and operations comply with the PSOS;
- Receive status reports on commissioning activities and identify any issues of non-compliance;
- Review AFP Contractor completion documentation and represent PWGSC during the completion certification process.

## **PROJECT BRIEF**

---

### **RS 2.4 Phase 4 – Post-Construction Phase**

During the Post-Construction Phase, the Consultant must provide the following services:

1. Preparing and updating technical non-compliance lists as required during this stage;
2. Receive status reports on deficiencies and minor matters and identify any issues of non-compliance;
3. Assist with handover of infrastructure to PWGSC by attending inspections, documenting and pursuing rectification of deficiencies;
4. Provide technical advice relating to FM performance specifications, as applicable.

## **PROJECT BRIEF**

---

### ANNEXES

Annex A: Strategic Directions

Annex B: Study Area Figure

Annex C: List of Existing Documentation

Annex D: Category of Personnel Definitions

## ANNEX A - SUMMARY – STRATEGIC DIRECTIONS

The Parliamentary Precinct is the home of Canada's federal parliamentary system and the place where Canadians gather to celebrate and express themselves in matters of national interest. The Parliamentary Precinct Branch (PPB) is responsible for the care and stewardship of these landmark buildings and grounds, and for providing accommodations and infrastructure that allows a modern parliament to better serve Canadians. An update to the 2006 LTPV is being undertaken to incorporate evolving conditions and requirements, to take advantage of new opportunities and to ensure the Plan reflects government priorities. This set of five strategic directions provides a framework to guide the update to the LTPV. How these strategic directions will be realized in the updated LTPV will be developed in the next phase of work, Phase 2. This next phase will be the result of the collaborative work of the project leadership team, a consulting team, the Parliamentary Partners, and stakeholder working groups over the course of the coming months. This collective work will identify functional, flexible, integrated and creative approaches to realize the full potential of the Precinct and its important role in the nation's capital.

### SUSTAINING THE ACTIVITIES OF THE PARLIAMENT OF CANADA

The Parliamentary Precinct is the symbolic heart of Canada. It is central to the country's history as a nation and is home to our federal parliamentary system including the institutions of the Senate, House of Commons, and Library of Parliament. It continues to be the place where Canadians gather for national celebrations and expressions of democracy. The Long-Term Vision and Plan (LTPV) provides a long-term approach for rehabilitating the Precinct's heritage buildings, meeting Parliamentary accommodation requirements, and providing a secure and welcoming environment for parliamentarians, staff, and visitors.

### EVOLVE TO A CAMPUS APPROACH FOR A MODERN PARLIAMENT

The LTPV Update will consider all buildings and lands north of Wellington Street, as well as the three blocks south of Wellington (between Elgin Street, Bank Street and north of Sparks Street) as a single, inclusive campus to facilitate more effective planning, development and support efficient Parliamentary operations. This will include:

**Parliamentary Accommodations.** Shifting the focus of new development opportunities for permanent accommodations from lands north of Wellington to Blocks 1, 2 and 3 while continuing the important rehabilitation work of existing assets north of Wellington Street.

**Infrastructure Planning.** Implementing integrated systems within the Campus and consolidating functions for greater efficiency, including material handling, waste management, food services, support services, surface and underground movement systems, stormwater management, etc.

**Security.** Integrating a comprehensive security plan for the campus, including the identification of security zones. Holistic physical security design requirements will be developed (with respect for institutional independence) for seamless protection, detection and response as well as addressing changing threat levels.

**Innovation.** Exploring proactive ways of integrating innovation in the way parliamentary functions and accommodations are provided and deployed in the precinct, including technological change and advances in how administrative space is used.

**Future Growth.** Considering strategies for future growth beyond the timeframe of the LTPV Update, along with potential opportunities to protect Parliament and provide for future requirements that have yet to be defined.

#### LEADERSHIP IN ENVIRONMENTAL SUSTAINABILITY

The LTPV Update will incorporate a comprehensive campus wide sustainability strategy with measurable and achievable targets in support of Government programs and commitments. This will include: exploring opportunities to reduce Parliament's ecological footprint through the use of clean energy sources, implementing more efficient and sustainable water and waste management, reviewing space standards and identifying transportation demand strategies.

#### ENRICHING THE VISITOR EXPERIENCE

The LTPV Update will identify and incorporate new standards, guidelines and best practices regarding visitor experience to contribute to a world class capital city and provide a memorable visitor experience. This will include identifying designated universally accessible routes for the grounds and exploring opportunities for greater integration between Parliament Hill and surrounding areas, including support to the revitalization of Sparks Street and re-imagining Wellington Street to improve its aesthetic appeal and walkability.

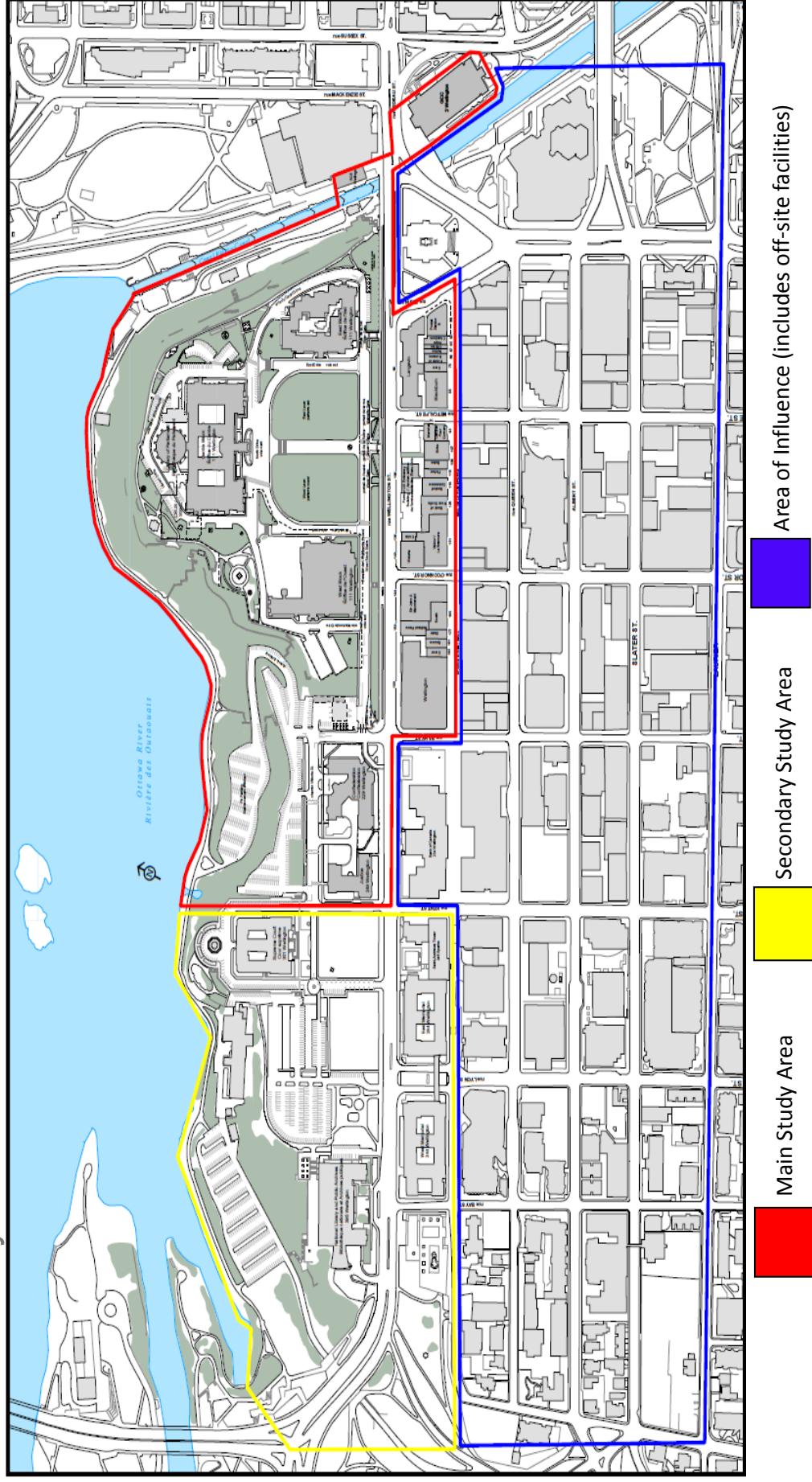
#### RESPONSIBLE STEWARDSHIP

Looking to the future, the continued good stewardship of the Parliamentary Campus remains paramount. The LTPV will identify ways to achieve multiple objectives simultaneously and maximize Canadians' investment in preserving our cultural heritage and protecting the dignity of Parliament.

#### ENGAGING CANADIANS

The future of the Parliamentary Precinct – the heart of our country's democracy – must be envisioned with the hopes of all Canadians in mind. In support of the Government of Canada's commitment to an open, transparent government, a public engagement strategy will be developed to support the LTPV Update to ensure that the Precinct continues to be a welcoming and meaningful place that reflects the values and aspirations of all Canadians.

## Annex B: Study Area



## **PROJECT BRIEF**

### ANNEX C – LIST OF AVAILABLE DOCUMENTATION

<b>DOCUMENT TITLE (DATE)</b>	<b>AUTHOR</b>
Sir John A. Macdonald (SJAM) Building Tunnel to West Block - Feasibility Study (2013)	Schoeler & Heaton Architects inc.
Blocks 123 Master Plan - Phase 1 Building Inventory (2013)	Groupe IBI - CHBA
Blocks 123 Master Plan – Phase 1 Site Analysis (2013)	Groupe IBI - CHBA
Blocks 123 Master Plan – Phase 2 Vision, Guiding Principles and Design Guidelines (2013)	Groupe IBI - CHBA
Blocks 123 Master Plan - Phase 3 Conceptual Planning (2013)	Groupe IBI - CHBA
The Parliamentary Precinct Long Term and Planning Framework - Urban Design Study (2001)	Phillips Farewaag Smalberg Inc., Hotson Bakker Architects, Julian Smith & Associates Architects
The Parliamentary Precinct Area - Urban Design Guidelines and Demonstration Plan for Long Range Development (1987)	du Toit Allsopp Hillier
Universal Accessibility Study (2013)	PWGSC – CoE
Analysis of Potential Sites for Future Commemorations on Parliament Hill (2013)	Groupe IBI-CHBA
Canada's Capital Commemoration Plan (2006)	NCC
Capital Commemoration - An Urban Design Study for Memorials in the Core of the National Capital (1988)	du Toit Allsopp Hillier
Comprehensive Commemoration Program and Policy for Canada's Capital (2006)	NCC
Feasibility Report: Interim Vehicle Screening Facility, Vittoria Way (Site "B") (2011)	Plania / Douglas Associates Landscape Architects et al.
Assessment of Options for the Location of the Immediate Vehicle Screening Facility, Parliamentary Precinct (2009)	Douglas Associates Landscape Architects Ltd. / Plani Cité
Library of Parliament Access and Loading Dock Feasibility Study (2014)	Watson MacEwen Teramura Architects, bpa & Hanscomb Limited
West Block Interim Visitor Welcome Centre, Feasibility Report (2009)	Watson MacEwen Architects
Visitor Welcome Centre Feasibility Report (2009)	Watson MacEwen Architects
The Parliament Hill Welcome Centre Feasibility Study (2006)	HOK Canada
Blocks 1, 2, 3 Parking Functional Requirements (2012)	CIMA Urban Planning & Sustainable Development
Security Boundaries, Parliamentary and Judicial Precincts Area, Development Plan 2005 Update (2005)	du Toit Allsopp Hillier

## **PROJECT BRIEF**

Parliament Hill Final Report Vehicular and Pedestrian Traffic Assessment (2012)	Levac Robichaud Leclerc
Report on Parliament Hill Site Characterization Study - Ottawa, Ontario [SECRET] (2013)	Golder Associates Ltd.
Geotechnical Characterization for Blocks 1, 2, 3 - Area Bound by Wellington, Elgin, Sparks and Bank Streets, Ottawa, On. (2014)	Stantec
Agreement - LTVP Planning Program 2007-2011 and Accommodation Requirements, Between the Parliamentary Partners and PWGSC (2007)	PWGSC
Parliamentary and Judicial Precincts Area Development Plan, 2005 Update - Background Report (2005)	du Toit Allsopp Hillier
Summary of Accommodation Requirements of the Parliamentary Partners and Capacity Analysis - Senate of Canada, House of Commons, Library of Parliament (2006)	PWGSC
Report of the Advisory Commission on Parliamentary Accommodation (Abbott Report) (1976)	Abbott, Douglas C., P.C., Q.C.
Blocks 123 Planning Considerations	
Competing Identities: The Evolution of Parliament Hill and its Urban Context (1999)	Julian Smith & Associates, Architects
Sparks Street Then and Now: An Evolving Streetscape and Public Space (2003)	Queen's University
Block One Infill - Development Guidelines, Stage One Findings Report (2003)	Martineau & Haar Architects Inc.
Sparks Street Redevelopment Site One - Volume 2 - Concept Design Report (1992)	PWGSC
Sparks Street Redevelopment Site One - Volume 3 - Feasibility Study (1993)	PWGSC
Heritage Assessment Block One Redevelopment Ottawa (2001)	Julian Smith & Associates, Architects
Block One Design Development Guidelines (2004)	Smith Carter Martineau Harr
Block One Heritage Study Draft Final Report (2002)	Graham Murfitt Architect
Block One Assessment (2001)	FoTenn Consultants Inc., Colliers International, Brisbin Brook Beynon Architects
Block 1 Servicing Review (2003)	Martineau and Haar Architects
Block 2 - A Preliminary Vision (2005)	Brisbin Brook Beynon Architects, Sypher, Fournier Gersovitz Moss & Associés Architects, FoTenn
Block 3 Redevelopment Options Assessment (2002)	FoTenn Consultants Inc., Colliers International, Brisbin Brook Beynon Architects



## **PROJECT BRIEF**

Sparks Street, Block 3 - Guideline for Development, Urban Design and Heritage – DRAFT (1996)	PWGSC
Block Three - Sparks Street, Heritage Value Guidelines – DRAFT (1996)	PWGSC
Heritage Assessment Block Three – Ottawa (2001)	Julian Smith & Associates, Architects
Sparks Street Redevelopment Site Four - Volume 2 (1992)	PWGSC
Confederation - Justice - Infill Building Feasibility Study (2005)	KWC Architects Inc.
Committee/Multipurpose room, Confederation and Wellington Buildings, Feasibility Study, Parliamentary Precinct (2006)	DFS Architects
West Terrace Site Plan Study - Sketch Alternatives (1996)	du Toit Allsopp Hillier
Pierre Elliott Trudeau Judicial Building (2005)	NORR Limited Architects and Engineers
Pierre Elliott Trudeau Federal Judicial Building (Presentation) (2003)	NORR Limited Architects & Engineers, Carlos Ott Architect, and Edmundson Matthews Architects.
North of Wellington Study (2003)	PWGSC
Feasibility Study to Provide Service Access to the Portrait Gallery of Canada and Block 2 (2003)	Le Groupe ARCOP
Blocks 1, 2, 3 Retail Functional Requirements (2012)	CIMA Urban Planning & Sustainable Development
The Heritage Value of the West Sector Area of the Parliamentary Precinct (circa 2014)	Jacqueline Hucker
Strategic Environmental Assessment for the Parliamentary Precinct's Long Term Vision and Plan (2004)	STW Enviro Consulting Inc.
Phase III Environmental Site Assessment and Screening Level Risk Assessment Bank Street Valley Site (2003)	Trow Associates Inc
Phase I: Environmental Site Assessment - The Grounds of Parliament Hill (2000)	Viridis Environmental and Oakhill Environmental
Ecological Capacity - Parliamentary and Judicial Precinct. Ottawa ON. (2005)	PWGSC
Landscape Design Guidelines to Parliamentary Precinct Directorate (1996)	PWGSC
Parliament Hill - Grounds Improvement Study (1994)	du Toit Allsopp Hillier
Landscape Conservation Guidelines for Parliament Hill for Parliamentary Precinct Directorate (1997)	PWGSC
Pre-Feasibility Study For An Underground Parking Facility Underneath The Garden Of The Provinces (2004)	Daniel Arbour & Associates, Partnership
Business Case, Parliamentary Precinct Parking: Crown Owned vs. Leased Parking (2005)	PWGSC



## **PROJECT BRIEF**

Cliff Street Parking Permanent Structure Feasibility Study (2003)	Le Groupe ARCOP
National Archives Pit Parking Facility Servicing Review (2002)	TSH Engineers, Architects, Planners
Feasibility Review of Vehicular Tunnel - Parliamentary Precinct (2004)	NCE
Preliminary Location of Wellington Street Tunnels (1996)	J.P. Braaksma & Associates
Planning Principles for Service Tunnel Concepts on Parliament Hill (1995)	J.P. Braaksma & Associates
Parliamentary Review of Lyon Street Screening Facility (2004)	NCE
Traffic & Security Assessment of the Parliamentary Promenade (2004)	FoTenn / NCE
Vehicle Screening Facility Feasibility Report (2004)	Duschenes & Fish / DFS Architects
Investigation of a Vehicular Surface Link in the Judicial Precinct (Shuttle Bus Access) (2004)	ENVision–The Hough Group Norr Limited Architects & Engineers
Stage 2 and 3 Assessment of CBUS Building Site Parliament Hill, Ottawa Ontario (1996)	Heritage Quest Inc.
Phase 1 Archaeological Investigation of New Federal Court Building Site - West Parliament Hill, Ottawa, Ontario (1993)	Heritage Quest Inc.
Volume Estimates and Review of Remedial Approaches - Parliamentary Precinct, Ottawa Ontario (2005)	Stantec
Visitor's Center Localization of the Underground Service Corridors for Parliament Hill (2003)	Genivar
Accommodation Strategy and Feasibility Study for the Library and Archives of Canada, 395 Wellington St. Ottawa (2003)	FoTenn Consultants Inc., Brisbin Brook Beynon Architects
Visitors Welcome Centre Parliamentary Precinct Security Screening Considerations (2009) <b>[CONFIDENTIAL]</b>	CH2M HILL
Sparks Street Mall Vocation Study Phase 1 and 2 (2003 and 2004)	Prepared for the NCC by UrbanMetric Inc. et al.
Conservation Guidelines for the Supreme Court of Canada Building and Site (2001)	PWGSC / HCD
Real Estate Options in the National Capital Region Library and Archives Canada (2003)	FoTenn Consultants Inc.
Blocks 1, 2, 3 Retail Functional Requirements (2012)	CIMA Urban Planning & Sustainable Development
Landscape Master Plan - Pierre Elliott Trudeau Judicial Building (2004)	Envision - The Hough Group, NORR Limited Architects & Engineers
The Landscape of Parliament Hill - A History and	Common Wealth Historic Resource

## **PROJECT BRIEF**

Inventory (1991)	Management Limited
Chronology of Vegetative Change Along the Ottawa River Escarpment from the Head of the Rideau Canal to the National Archives/National Library Area, 1800-1999 (2001)	Edwinna von Baeyer
Long Term Site Security Plan for the Parliamentary Precinct: Update to the Parliamentary Precinct Security Working Group (2004)	FoTenn Consultants Inc.
Parliament Hill Final Report Vehicular and Pedestrian Traffic Assessment (2012)	Levac Robichaud Leclerc

## **PROJECT BRIEF**

### ANNEX D – CATEGORY OF PERSONNEL DEFINITIONS

<b>ARCHITECTURE</b>	
<b>Discipline</b>	Architect, Advocate Architect
<b>LEVEL</b>	<b>ROLE</b>
Principal in charge / Project Manager	The single individual having overall control, and accountability for the overall delivery of the Consultant services. Beyond the traditional responsibilities typically assumed by the Principle in Charge (as referenced in the RAIC Handbook of Practice) with respect to contract performance, the Principal in charge / Project Manager shall personally spearhead on a hands-on basis, the active management of the entire consultant team, and its sub-consultants.
Senior/Lead Architect	Responsible for managing major architectural design projects and consultant coordination. Over 12 years of experience on major complex projects. Note 1.
Lead Advocate Architect	Responsible for managing projects under Stream 3 for which Advocate Architect Services are required, and for Stream 3 Consultant coordination. Over 12 years of experience on major complex projects. Note 1.
Intermediate Architect	Responsible for leading teams and establishing/ developing scope of work. Between 5 - 12 years of major project experience. Note 2.
Junior Architect	Responsible for developing and detailing the established scope of work. Has less than 5 years of experience. Note 2.
Senior Architectural Technologist	Responsible for leading teams and supervising field review/ coordination. Over 12 years of experience on major projects. Note 2.
Intermediate Architectural Technologist	Responsible for technical development of project, coordinating teams. Between 5 - 12 years of experience on major projects. Note 2.
Junior Architectural Technologist	Responsible for assisting the technical development and detailing of the established scope of work. Has less than 5 years of experience. Note 2.
Senior Architectural Technician/Draftsman	Responsible for coordinating and executing technical and CAD drawing development of project. Between 5 - 12 years of experience on major projects. Note 2.

## **PROJECT BRIEF**

---

Intermediate Architectural Technician/Draftsman	Responsible for executing technical and CAD drawing development of project. Between 5 - 12 years of major experience. Note 2.
Junior Architectural Technician/Draftsman	Responsible for assisting technical and CAD drawing development of project. Less than 5 years of project experience. Note 2.
Architectural Co-op Student	Responsible for supporting project design or technical team.
Consultant Resident Site Representative	Responsible for providing resident site services as defined in the Project Brief. Over 12 years of experience on major projects. Note 1.

## **PROJECT BRIEF**

<b>ENGINEERING</b>	
<b>Disciplines</b>	Structural, Mechanical, Electrical, Geotechnical, Civil
<b>Level</b>	<b>Role</b>
Senior/Lead Engineer	Project Lead responsible for managing major projects and consultant coordination. Over 12 years of experience on major complex projects. Note 1.
Intermediate Engineer	Responsible for leading teams and establishing/ developing scope of work. Between 5 - 12 years of major project experience. Note 2.
Junior Engineer	Responsible for developing and detailing the established scope of work. Has less than 5 years of experience. Note 2.
Senior Technologist	Responsible for leading teams and supervising field review/ coordination. Over 12 years of experience on major projects. Note 2.
Intermediate Technologist	Responsible for technical development of project, coordinating teams. Between 5 - 12 years of experience on major projects. Note 2.
Junior Technologist	Responsible for assisting the technical development and detailing of the established scope of work. Has less than 5 years of experience. Note 2.
Senior Technician	Responsible for coordinating and executing technical and CAD drawing development of project. Between 5 - 12 years of experience on major projects. Note 2.
Intermediate Technician	Responsible for executing technical and CAD drawing development of project. Between 5 - 12 years of major experience. Note 2.
Junior Technician	Responsible for assisting technical and CAD drawing development of project. Less than 5 years of project experience. Note 2.
Co-op Student	Responsible for supporting project design or technical team.

## **PROJECT BRIEF**

<b>OTHER DESIGN PROFESSIONALS</b>	
<b>Disciplines</b>	Urban Design, Urban Planning, Landscape Architecture, Conservation Architecture, Interior Design
<b>Level</b>	<b>Role</b>
Senior/Lead Professional	Responsible for managing major projects and consultant coordination. Over 12 years of experience on major complex projects. Note 1.
Intermediate Professional	Responsible for leading teams and establishing/ developing scope of work. Between 5 - 12 years of major project experience. Note 2.
Junior Professional	Responsible for developing and detailing the established scope of work. Has less than 5 years of experience. Note 2.
Senior Technologist	Responsible for leading teams and supervising field review/ coordination. Over 12 years of experience on major projects. Note 2.
Intermediate Technologist	Responsible for technical development of project, coordinating teams. Between 5 - 12 years of experience on major projects. Note 2.
Junior Technologist	Responsible for assisting the technical development and detailing of the established scope of work. Has less than 5 years of experience. Note 2.
Senior Technician	Responsible for coordinating and executing technical and CAD drawing development of project. Between 5 - 12 years of experience on major projects. Note 2.
Intermediate Technician	Responsible for executing technical and CAD drawing development of project. Between 5 - 12 years of major experience. Note 2.
Junior Technician	Responsible for assisting technical and CAD drawing development of project. Less than 5 years of project experience. Note 2.
Co-op Student	Responsible for supporting project design or technical team.

## **PROJECT BRIEF**

<b>OTHER SPECIALTY SERVICES</b>	
<b>Disciplines</b>	Cost Specialist (Note 2, 3), Time Specialist (Note 2, 3), Risk Specialist (Note 2, 3), Building Information Modeling (BIM), Sustainable Development Specialist, Smart/Intelligent Building Specialist, Climate Change Vulnerability and Risk Assessment Specialist, Green/Clean Technology Specialist, Building Envelope, IT/Telecommunications Specialist, Building Code Specialist, Audio-visual Specialist, Acoustic Specialist, Security Specialist, Food Services/Kitchen Consultant, Vertical Transportation Specialist, Wayfinding and Signage Specialist, Roofing Specialist, Traffic Specialist, Lighting Specialist, Hardware Design Specialist, Move Coordination Specialist, Indigenous Affairs Specialists, Blast Engineering Specialists (Note 1), Public Consultation Specialist, Industrial Engineering/Material Handling Specialist
<b>Level</b>	<b>Role</b>
Senior Specialist	Responsible for providing discipline services through major projects. Over 12 years of experience. Note 2.
Intermediate Specialist	Responsible for providing discipline services through major projects. Between 5 - 12 years of major project experience. Note 2.
Junior Specialist	Responsible for supporting senior and intermediate discipline specialists through major projects. Has less than 5 years of experience. Note 2.
<b>Support Personnel for "Other Specialty Services" disciplines listed above</b>	
Senior Technologist	Responsible for leading teams and supervising field review/coordination. Over 12 years of experience on major projects. Note 2.
Intermediate Technologist	Responsible for technical development of project, coordinating teams. Between 5 - 12 years of experience on major projects. Note 2.
Junior Technologist	Responsible for assisting the technical development and detailing of the established scope of work. Has less than 5 years of experience. Note 2.
Senior Technician	Responsible for coordinating and executing technical and CAD drawing development of project. Between 5 - 12 years of experience on major projects. Note 2.
Intermediate Technician	Responsible for executing technical and CAD drawing development of project. Between 5 - 12 years of major experience. Note 2.

## **PROJECT BRIEF**

Junior Technician	Responsible for assisting technical and CAD drawing development of project. Less than 5 years of project experience. Note 2.
Co-op Student	Responsible for supporting project design or technical team.

### **Notes:**

1. The Consultant, Sub-consultants/Specialists and their personnel must be capable of practicing architecture and engineering, licenced or eligible to be licenced, certified or otherwise to provide professional services in Ontario to the full extent as required for project services.
2. Resources to have appropriate academic or technical qualifications for the position.
3. Resources must hold a relevant PMI certification or equivalent.
4. A valid Professional Quantity Surveyor designation registered with the Canadian Institute of Quantity Surveyors (CIQS) or equivalent. The list of equivalents can be found on the Canadian Institute of Quantity Surveyors website.