

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

**Regional Manager/Real Property  
Contracting/PWGSC  
Ontario Region, Tendering Office  
10th Floor, 4900 Yonge Street  
Toronto  
Ontario  
M2N 6A6**

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

### Departmental Individual Standing Offer (DISO)

Offre à commandes individuelle du département(OCID

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

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

## Comments - Commentaires

Address Enquiries to:  
E-mail: [Lauren.Woodhall@pwgsc.gc.ca](mailto:Lauren.Woodhall@pwgsc.gc.ca)

Adresser toutes questions à:  
Courriel : [Lauren.Woodhall@pwgsc.gc.ca](mailto:Lauren.Woodhall@pwgsc.gc.ca)

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

**Issuing Office - Bureau de distribution**

Regional Manager/Real Property Contracting/PWGSC  
Ontario Region, Tendering Office  
12th Floor, 4900 Yonge Street  
Toronto, Ontario  
M2N 6A6  
Ontario

<b>Title - Sujet</b> Architectural Services	
<b>Solicitation No. - N° de l'invitation</b> EQ754-193417/A	<b>Date</b> 2019-04-15
<b>Client Reference No. - N° de référence du client</b> EQ754-193417	<b>GETS Ref. No. - N° de réf. de SEAG</b> PW-\$PWL-035-2451
<b>File No. - N° de dossier</b> PWL-8-41133 (035)	<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 2019-05-28</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>Delivery Required - Livraison exigée</b>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Woodhall, Lauren	<b>Buyer Id - Id de l'acheteur</b> pwl035
<b>Telephone No. - N° de téléphone</b> (416)230-9083 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> Ontario Region	
<b>Security - Sécurité</b> This request for a Standing Offer does not include provisions for security. Cette Demande d'offre à commandes ne comprend pas des dispositions en matière de sécurité.	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

**REQUEST FOR STANDING OFFER**

**ARCHITECTURAL SERVICES**

**ONTARIO REGION**

**SOLICITATION No.: EQ754-193417/A**

**PWGSC Contracting Authority:**

**Lauren Woodhall**  
**4900 Yonge Street**  
**Toronto, Ontario M2N 6A6**  
**Telephone: 416-230-9083**  
**Email: [lauren.woodhall@pwgsc.gc.ca](mailto:lauren.woodhall@pwgsc.gc.ca)**

---

**REQUEST FOR STANDING OFFER (RFSO)**

**ARCHITECTURAL SERVICES**

**TABLE OF CONTENTS**

Front Page

Table of Contents

Supplementary Instructions to Proponents (SI)

- SI 1 Integrity Provisions – Declaration of Convicted Offences
- SI 2 Federal Contractors Program For Employment Equity - Certification
- SI 3 Security Requirements

General Instructions to Proponents (GI)

Standing Offer Particulars (SP)

Terms and Conditions

- General Conditions (GC)
- Supplementary Conditions (SC)
- Terms of Payment (TP)
- Consultant Services (CS)
- Calculation of Fees (CF)

Standing Offer Brief

- Agreement Description (AD)
- Agreement Administration (AA)
- Required Services (RS)

Submission Requirements and Evaluation (SRE)

- Appendix A Declaration/Certifications Form
- Appendix B Price Proposal Form
- Appendix C Team Identification
- Appendix D Doing Business with PWGSC
- Appendix E Performance Evaluation - Consultant Performance Evaluation Report Form (CPERF)
- Appendix F Ontario Region - Geographic Boundaries by County

## SUPPLEMENTARY INSTRUCTIONS TO PROPONENTS (SI)

### SI 1 INTEGRITY PROVISIONS – DECLARATION OF CONVICTED OFFENCES

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

### SI 2 FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

By submitting a proposal, the Proponent certifies that the Proponent, and any of the Proponent's members if the Proponent is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list 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, or to set-aside a Standing Offer, if the Proponent, or any member of the Proponent if the Proponent is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list at the time of issuing of a Standing Offer or during the period of the Standing Offer.

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

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

### SI 3 SECURITY REQUIREMENTS

Proponents are hereby informed that there is a strong possibility that some call-ups against the Standing Offers might require that the consultants and their personnel possess a Designated Organization Screening (DOS) at the RELIABILITY level issued by the Contract Security Program of Public Works and Government Services Canada (PWGSC). Proponents should commence the process early as it may take time to achieve.

Should a Proponent not have the level of security indicated above, the security clearance process can be initiated by the Proponent by contacting the PWGSC Security Advisor at the coordinates below:

Regional Chief Security and Emergency Preparedness

Telephone: 416-220-5269  
Email: [OntSecurity.Securite@pwgsc-tpsgc.gc.ca](mailto:OntSecurity.Securite@pwgsc-tpsgc.gc.ca)

Successful proponent(s) issued a standing offer as a result of this RFSO, not possessing the required security clearance at time of call up, will be bypassed and PWGSC will proceed to the next consultant who possesses the required security clearance and it is furthest away from the

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

ideal business distribution. Refer to the Standing Offer Particulars SP 5.1 a for information regarding ideal business distribution.

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

## **GENERAL INSTRUCTIONS TO PROPONENTS (GI)**

### **Integrity Provisions - Proposal**

- GI 1 Definitions
- GI 2 Introduction
- GI 3 Procurement Business Number
- GI 4 Contracting Authority and Departmental Representative
- GI 5 Quantity
- GI 6 PWGSC Obligation
- GI 7 Responsive Proposals
- GI 8 Communications - Solicitation Period
- GI 9 Overview of Selection Process
- GI 10 Submission of Proposal
- GI 11 Non-Acceptance of Electronically Transmitted Proposals
- GI 12 Evaluation of Price
- GI 13 Limitation of Submissions
- GI 14 Licensing Requirements
- GI 15 Rejection of Proposal
- GI 16 Not applicable
- GI 17 Insurance Requirements
- GI 18 Joint Venture
- GI 19 Late Submissions
- GI 20 Legal Capacity
- GI 21 Debriefing
- GI 22 Financial Capability
- GI 23 Revision of Proposal
- GI 24 Performance Evaluation
- GI 25 Proposal Costs
- GI 26 Conflict of Interest - Unfair Advantage
- GI 27 Limitation of Liability
- GI 28 Status and Availability of Resources
- GI 29 Code of Conduct for Procurement - Proposal

---

## GENERAL INSTRUCTIONS TO PROPONENTS

### Integrity Provisions – Proposal

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

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

## GI 1 DEFINITION

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

"Applicable Taxes":

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

"Consultant Team":

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

"Key Personnel":

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

"Price Rating":

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

"Proponent":

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

"PWGSC Evaluation Board":

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

"Technical Rating":

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

## GI 2 INTRODUCTION

1. Public Works and Government Services Canada (PWGSC) is inviting experienced Architectural consulting firms with in-house resources and/or a team of sub-consultants which will include structural engineers, mechanical engineers, electrical engineers, IT/Telecommunications specialist, functional programmers, interior designers, specification writers, cost estimators, sustainable design specialists, heritage conservation specialist, and, building envelope specialists to submit proposals for Standing Offers.



The selected consultants shall provide a range of services as identified in the Required Services section of this document for projects in the Ontario Region. The selected consultants shall provide a range of services including investigation and recommendations reports, functional programming, feasibility studies, and cost estimates. At times, the selected consultants may be required to provide full service for design, construction and supervision for small renovations, additions, and tenant fit-up work in Crown-owned buildings. At other times, a specific sub-consultant and/or specialist may be requested to provide a standalone service such as functional programming, life cycle cost analysis, hygrothermal modeling, cost estimating or specification writing for a variety of projects. The services of other specific specialists, outside of the consultant team, may be required for some projects and will be identified at time of call-up. These range of services will generally cover, but will not be limited to the following types of projects:

- General purpose office space for defined user;
  - Special purpose office space for high-security or high-technology users;
  - Laboratory and other special purpose space for research and development activities;
  - Museum and other cultural facilities;
  - Warehouses, archives and storage structures;
  - Detention facilities;
  - Minimum, medium and maximum security correctional institutions;
  - Evaluation of damaged structures;
  - Building assessments reports;
  - Roof investigation reports;
  - Building envelope screening reports (heritage and non-heritage buildings);
  - Space optimization analysis;
  - Feasibility studies;
  - Interior Fit-Ups; and
  - Compliance Review.
2. Proponents shall be licensed or eligible to be licensed to practise in the province of Ontario. Firms should be able to demonstrate successful delivery of these services for a broad variety of projects over the last five (5) years. In general, the firm and its personnel will be evaluated on the basis of their demonstrated understanding of the scope of services, their approach and methodology to providing those services, the quality of their relevant experience in this area, as well as the cost of the provision of the services.
3. For the purposes of this Request for Standing Offer (RFSO) the province of Ontario has been subdivided into four regions. It is PWGSC's intention to award up to four (4) Standing Offers for Central Ontario and South Western Ontario, up to three (3) for the Northern Ontario and up to five (5) Standing Offers for Eastern Ontario, each for a period of three (3) years from the date of issuance of the Standing Offers. The geographic boundaries for each of the identified regions is delineated in 'Appendix F - Ontario Region - Geographic Boundaries by County'. The total dollar value of all Standing Offers is estimated to be \$20,000,000.00 (HST Included). Individual call-ups will vary, up to a maximum of \$1,000,000.00 (HST included). Proponents should note that there is no guarantee that the full or any amount of the Standing Offers will be called-up; PWGSC will award call-ups only when the specific services to be provided under the Standing Offer are needed. Proponents should also note that Call-ups may vary from \$10,000.00 for smaller requirements up to the \$1,000,000.00 limitation under exceptional circumstances. Proponents may not refuse Call-ups based on dollar value. **If more than three (3) requests for services (Call-ups) are refused by the Consultant, Canada reserves the right to set-aside the Standing Offer.** Please refer to Section SP5, CALL-UP PROCEDURE.
4. This procurement is subject to the provisions of the North American Free Trade Agreement (NAFTA), World Trade Organization - Agreement on Government Procurement (WTO-AGP), Canada-European Union Comprehensive Economic and Trade Agreement (CETA), Canadian

---

Free Trade Agreement (CFTA), the Canada-Colombia Free Trade Agreement (FTA) and the Canada-Peru FTA.

### **GI 3 PROCUREMENT BUSINESS NUMBER**

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

### **GI 4 CONTRACTING AUTHORITY AND DEPARTMENTAL REPRESENTATIVE**

1. The Contracting Authority for this Request for Standing Offer is:

Lauren Woodhall  
Public Works and Government Services Canada  
Real Property Contracting  
4900 Yonge Street  
Toronto, ON  
M2N 6A6  
Tel: (416) 230-9083  
E-mail address: [lauren.woodhall@pwgsc-tpsgc.gc.ca](mailto:lauren.woodhall@pwgsc-tpsgc.gc.ca)

2. The Contracting Authority is responsible for the establishment of the Standing Offer, its administration, and any contractual issues relating to individual call-ups.
3. A Departmental Representative will be identified at time of each individual Call-Up.
4. The Departmental Representative will be responsible for all matters concerning the technical content of the work under the Call-Up.

### **GI 5 QUANTITY**

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

### **GI 6 PWGSC OBLIGATION**

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

### **GI 7 RESPONSIVE PROPOSALS**

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

### **GI 8 COMMUNICATIONS - SOLICITATION PERIOD**

1. Questions or requests for clarification during the solicitation period must be submitted in writing to the Contracting Authority named on the Request for Standing Offer - Page 1 at e-mail address

---

lauren.woodhall@pwgsc.gc.ca as early as possible. **Enquiries should be received no later than ten (10) working days prior to the closing date identified on the front page of the Request for Standing Offer.** Enquiries received after that time may not be answered.

2. To ensure the integrity of the competitive bid process, enquiries and other communications regarding the RFSO must be directed only to the Contracting Authority identified in the RFSO. Failure to comply with this requirement may result in the proposal being declared non-responsive.
3. To ensure consistency and quality of information provided to proponents, significant enquiries received and their replies will be posted on the Government Electronic Tendering Service (GETS).

## **GI 9 OVERVIEW OF SELECTION PROCESS**

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

## **GI 10 SUBMISSION OF PROPOSAL**

1. Canada requires that each proposal, at closing date and time or upon request from the Contracting Authority, be signed by the Proponent or by an authorized representative of the Proponent. If a proposal is submitted by a joint venture, it must be in accordance with section GI18.
2. It is the Proponent's responsibility to:
  - a) obtain clarification of the requirements contained in the Request for Standing Offer, if necessary, before submitting a proposal;
  - b) submit an original of the proposal plus the specified number of copies, duly completed, IN THE FORMAT REQUESTED, on or before the closing date and time set for receipt of proposals;
  - c) send its proposal only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit specified on page 1 of the Request for Standing Offer;
  - d) ensure that the Proponent's name, return address, the solicitation number and description, and solicitation closing date and time are clearly visible on the envelope or the parcel(s) containing the proposal; and
  - e) provide a comprehensive and sufficiently detailed proposal that will permit a complete evaluation in accordance with the criteria set out in the Request for Standing Offer.

3. The technical and price components of the proposal must be submitted in separate, easily identified envelopes in accordance with the instructions contained in the proposal document. Both envelopes shall be submitted as one package which shall clearly and conspicuously display and indicate on the outside of the package the information identified in paragraph 2. d) above.
4. Timely and correct delivery of proposals to the office designated for receipt of proposals is the sole responsibility of the Proponent. Public Works and Government Services Canada will not assume or have transferred to it those responsibilities. All risks and consequences of incorrect delivery of proposals are the responsibility of the Proponent.
5. The evaluation of proposals may result in authorization to utilize one or more Standing Offers in whole or in part, taking into consideration the evaluation criteria and selection method stated herein. The lowest or any proposal will not necessarily be authorized. In case of error in the calculation of prices, the unit prices will govern.
6. The proposal should completely and thoroughly address each element of the requirements as enumerated in the Request for Standing Offer. It is also essential that the elements contained in the proposal be stated in a clear and concise manner.
7. Proposal documents and supporting information may be submitted in either English or French.
8. Canada will make available Notices of Proposed Procurement (NPP), RFSOs and related documents for download through the Government Electronic Tendering Service (GETS). Canada is not responsible and will not assume any liabilities whatsoever for the information found on websites of third parties. In the event an NPP, RFSO or related documentation would be amended, Canada will not be sending notifications. Canada will post all amendments using GETS. It is the sole responsibility of the Proponent to regularly consult GETS for the most up-to-date information. Canada will not be liable for any oversight on the Proponent's part nor for notification services offered by a third party.

#### **GI 11 NON-ACCEPTANCE OF ELECTRONICALLY TRANSMITTED PROPOSALS**

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

#### **GI 12 EVALUATION OF PRICE**

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

#### **GI 13 LIMITATION OF SUBMISSIONS**

1. A Proponent may not submit more than one proposal. This limitation also applies to the persons or entities in the case of a joint venture. If more than one proposal is received from a Proponent (or, in the case of a joint venture, from the persons or entities), all such proposals shall be rejected and no further consideration shall be given.
2. A joint venture is defined as an association of two or more parties which combine their money, property, knowledge, skills, time or other resources in a joint business enterprise agreeing to share the profits and the losses and each having some degree of control over the enterprise.
3. An arrangement whereby Canada contracts directly with a consultant who may retain sub-consultants or specialist consultants to perform portions of the services is not a joint venture arrangement. A sub-consultant or specialist consultant may, therefore, be proposed as part of

the consultant team by more than one Proponent. The Proponent warrants that it has written permission from such sub-consultant or specialist consultant to propose their services in relation to the services to be performed.

4. Notwithstanding paragraph 3. above, in order to avoid any conflict of interest, or any perception of conflict of interest, a Proponent shall not include in its submission another Proponent as a member of its consultant team, as a sub-consultant or specialist consultant.
5. Any joint venture entered into for the provision of professional services or other services must be in full compliance with the requirements of any provincial or territorial law pertaining thereto in the Province or Territory in which the project is located.

#### **GI 14 LICENSING REQUIREMENTS**

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

#### **GI 15 REJECTION OF PROPOSAL**

1. Canada may reject a proposal where any of the following circumstances is present:
  - (a) the Proponent has been declared ineligible for selection, following unsatisfactory performance in a previous project as determined in accordance with the department's performance review procedures;
  - (b) an employee, sub-consultant or specialist consultant included as part of the proposal has been declared ineligible, for selection for work with the department in accordance with the performance review procedure referred to in paragraph 1.(a), which would render the employee, sub-consultant or specialist consultant ineligible to bid on the requirement, or the portion of the requirement the employee, sub-consultant or specialist consultant is to perform;
  - (c) the Proponent is bankrupt or where, for whatever reason, its activities are rendered inoperable for an extended period;
  - (d) evidence, satisfactory to Canada, of fraud, bribery, fraudulent misrepresentation or failure to comply with any law protecting individuals against any manner of discrimination, has been received with respect to the Proponent, any of its employees, any sub-consultant or any specialist consultant included as part of the proposal;
  - (e) evidence satisfactory to Canada that based on past conduct or behavior, the Proponent, a sub-consultant, a specialist consultant or a person who is to perform the Services is unsuitable or has conducted himself/herself improperly;
  - (f) with respect to current or prior transactions with the Government of Canada,
    - (i) Canada has exercised its contractual remedies of taking the services out of the consultant's hands, suspension or termination for default with respect to a contract with the Proponent, any of its employees, any sub-consultant or any specialist consultant included as part of the proposal;

- 
- (ii) Canada determines that the Proponent's performance on other contracts, including the quality of the services provided and the quality and timeliness of the delivery of the project, is sufficiently poor to jeopardize the successful completion of the requirement being bid on.
2. Where Canada intends to reject a proposal pursuant to subsection 1.(f), the Contracting Authority will so inform the Proponent and provide the Proponent ten (10) days within which to make representations, before making a final decision on the proposal rejection.

**GI 16 NOT APPLICABLE**

**GI 17 INSURANCE REQUIREMENTS**

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

**GI 18 JOINT VENTURE**

1. A joint venture is an association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to bid together on a requirement. Proponents who bid as a joint venture must indicate clearly that it is a joint venture and provide the following information:
- (a) the name of each member of the joint venture;
  - (b) the Procurement Business Number of each member of the joint venture;
  - (c) the name of the representative of the joint venture, i.e. the member chosen by the other members to act on their behalf, if applicable;
  - (d) the name of the joint venture, if applicable.
2. If the information is not clearly provided in the proposal, the Proponent must provide the information on request from the Contracting Authority.
3. The proposal and any resulting standing offer must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of all members of the joint venture. The Contracting Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the RFSO and any resulting standing offer. If a standing offer is issued to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of any contract resulting from a call-up against the standing offer.

**GI 19 LATE SUBMISSIONS**

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

**GI 20 LEGAL CAPACITY**

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

## **GI 21 DEBRIEFING**

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

## **GI 22 FINANCIAL CAPABILITY**

1. Financial Capability Requirement: The Proponent must have the financial capability to fulfill this requirement. To determine the Proponent's financial capability, the Contracting Authority may, by written notice to the Proponent, require the submission of some or all of the financial information detailed below during the evaluation of proposals. The Proponent must provide the following information to the Contracting Authority within fifteen (15) working days of the request or as specified by the Contracting Authority in the notice:
  - (a) Audited financial statements, if available, or the unaudited financial statements (prepared by the Proponent's outside accounting firm, if available, or prepared in-house if no external statements have been prepared) for the Proponent's last three fiscal years, or for the years that the Proponent has been in business if this is less than three years (including, as a minimum, the Balance Sheet, the Statement of Retained Earnings, the Income Statement and any notes to the statements).
  - (b) If the date of the financial statements in (a) above is more than five months before the date of the request for information by the Contracting Authority, the Proponent must also provide, unless this is prohibited by legislation for public companies, the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement), as of two months before the date on which the Contracting Authority requests this information.
  - (c) If the Proponent has not been in business for at least one full fiscal year, the following must be provided:
    - (i) the opening Balance Sheet on commencement of business (in the case of a corporation, the date of incorporation); and
    - (ii) the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement) as of two months before the date on which the Contracting Authority requests this information.
  - (d) A certification from the Chief Financial Officer or an authorized signing officer of the Proponent that the financial information provided is complete and accurate.
  - (e) A confirmation letter from all of the financial institution(s) that have provided short-term financing to the Proponent outlining the total of lines of credit granted to the Proponent and the amount of credit that remains available and not drawn upon as of one month prior to the date on which the Contracting Authority requests this information.
2. If the Proponent is a joint venture, the financial information required by the Contracting Authority must be provided by each member of the joint venture.

3. If the Proponent is a subsidiary of another company, then any financial information in 1. (a) to (e) above required by the Contracting Authority must be provided by the ultimate parent company. Provision of parent company financial information does not by itself satisfy the requirement for the provision of the financial information of the Proponent, and the financial capability of a parent cannot be substituted for the financial capability of the Proponent itself unless an agreement by the parent company to sign a Parental Guarantee, as drawn up by Public Works and Government Services Canada (PWGSC), is provided with the required information.
4. Financial Information Already Provided to PWGSC: The Proponent is not required to resubmit any financial information requested by the Contracting Authority that is already on file at PWGSC with the Contract Cost Analysis, Audit and Policy Directorate of the Policy, Risk, Integrity and Strategic Management Sector, provided that within the above-noted time frame:
  - (a) the Proponent identifies to the Contracting Authority in writing the specific information that is on file and the requirement for which this information was provided; and
  - (b) the Proponent authorizes the use of the information for this requirement.

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

## **GI 23 REVISION OF PROPOSAL**

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

## **GI 24 PERFORMANCE EVALUATION**

Proponents shall take note that the performance of the Consultant during and upon completion of the services shall be evaluated by Canada. The evaluation includes all or some of the following criteria: Design, Quality of Results, Management, Time and Cost. Should the Consultant's performance be considered unsatisfactory, the Consultant may be declared ineligible for future contracts. The form



---

**PWGSC-TPSGC 2913-1**, SELECT - Consultant Performance Evaluation Report (<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/documents/2913-1.pdf>), is used to record the performance.

## **GI 25 PROPOSAL COSTS**

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

## **GI 26 CONFLICT OF INTEREST - UNFAIR ADVANTAGE**

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

## **GI 27 LIMITATION OF LIABILITY**

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

## **GI 28 STATUS AND AVAILABILITY OF RESOURCES**

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

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

## **GI 29 CODE OF CONDUCT FOR PROCUREMENT – PROPOSAL**

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

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

## **STANDING OFFER PARTICULARS (SP)**

- SP 1 General
- SP 2 Withdrawal/Revision
- SP 3 Period of the Standing Offer
- SP 4 Call-Up Limitation
- SP 5 Call-Up Procedure
- SP 6 Invoicing

---

## STANDING OFFER PARTICULARS

### SP 1 GENERAL

1. The Consultant acknowledges that a standing offer is not a contract and that the issuance of a Standing Offer and Call-up Authority does not oblige or commit Canada to procure or contract for any services listed in the Standing Offer.
2. The Consultant offers to provide and deliver to Canada the services described in the Standing Offer, in accordance with the pricing set out in the Standing Offer if, and when the Contracting Authority may request such services, in accordance with the conditions listed at subsection 3 below.
3. The Consultant understands and agrees that:
  - a) a call-up against the Standing Offer will form a contract only for those services which have been called-up, provided that such call-up is made in accordance with the provisions of the Standing Offer;
  - b) Canada's liability is limited to that which arises from call-ups against the Standing Offer made within the period specified in the Standing Offer;
  - c) Canada has the right to procure the services specified in the Standing Offer by means of any other contract, standing offer or contracting method;
  - d) the Standing Offer cannot be assigned or transferred in whole or in part;
  - e) the Standing Offer may be set aside by Canada at any time.
  - f) **if more than three (3) requests for services (Call-ups) are refused by the Consultant, Canada reserves the right to set-aside the Standing Offer.**

### SP 2 WITHDRAWAL/REVISION

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

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

### SP 3 PERIOD OF THE STANDING OFFER

The period for placing call-ups against the Standing Offer shall be for three (3) years commencing from the start date identified on the Standing Offer.

### SP 4 CALL-UP LIMITATION

Each call-up against the Standing Offer will have a maximum limitation of expenditure of \$1,000,000.00 (HST included). The call-up limitation includes fees and all related disbursements.

### SP 5 CALL-UP PROCEDURE

1. Services will be called-up as follows:

- a) The Departmental Representative will establish the scope of services to be performed. For each individual Call-Up, consultants will be considered using a computerized distribution system. For Central Ontario and South Western Ontario, the system will contain for each consultant an ideal business distribution percentage which has been established as follows; 36% of the business for the top ranked consultant, 28% for the 2nd ranked consultant, 21% for the 3rd ranked consultant and 15% for the 4th. For Northern Ontario, the system will contain for each consultant an ideal business distribution percentage which has been established as follows; 43% of the business for the top ranked consultant, 32% for the 2nd ranked consultant and 25% for the 3rd ranked consultant. For Eastern Ontario, the system will contain for each consultant an ideal business distribution percentage which has been established as follows; 34% of the business for the top ranked consultant, 24% for the 2nd ranked consultant, 19% for the 3rd ranked consultant, 14% for the 4th ranked consultant, and 9% for the 5th. In the event fewer than four (4) consultants for the Central Ontario and South Western Ontario regions, fewer than three (3) consultants for the Northern Ontario region and fewer than five (5) for the Eastern Ontario region are successful, the undistributed % of business will be redistributed amongst the offerors being recommended using the following formula:

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

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

- b) Unless otherwise stated by the Departmental Representative, the Consultant is required to respond within five (5) working days in writing to the Departmental Representative to confirm acceptance or refusal of the Call-Up. Failure to respond within the five (5) working day deadline will constitute the Consultant's declination to the Call-up.

If accepted, the Consultant will be provided the scope of services and given a reasonable deadline for submission of a proposal. The proposal submission deadline will be established by the Departmental Representative and will be based on the size and complexity of project.

Should the Consultant fail to meet the response or proposal submission deadline, Canada reserves the right not to further consider the Consultant for the call-up, and select the next consultant who is furthest away from the ideal business distribution.

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

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

#### **SP 6 INVOICING**

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

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

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

## TERMS AND CONDITIONS

0220DA	General Conditions (GC)
0000DA	Supplementary Conditions (SC)
9998DA	Terms of Payment (TP)
9999DA	Consultant Services (CS)
2000DA	Calculation of Fees (CF)

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

**0220DA      GENERAL CONDITIONS**

GC 1	Definitions
GC 2	Interpretations
GC 3	Not applicable
GC 4	Assignment
GC 5	Indemnification
GC 6	Notices
GC 7	Suspension
GC 8	Termination
GC 9	Taking the Services Out of the Consultant's Hands
GC 10	Time and Cost Records to be Kept by the Consultant
GC 11	National or Departmental Security
GC 12	Rights to Intellectual Property
GC 13	Conflict of Interest and Values and Ethics Codes for the Public Service
GC 14	Status of Consultant
GC 15	Declaration by Consultant
GC 16	Insurance Requirements
GC 17	Resolution of Disagreements
GC 18	Amendments
GC 19	Entire Agreement
GC 20	Contingency Fees
GC 21	Harassment in the Workplace
GC 22	Taxes
GC 23	Changes in the Consultant Team
GC 24	Joint and Several Liability
GC 25	Performance evaluation - contract
GC 26	International Sanctions
GC 27	Integrity Provisions - Standing Offer
GC 28	Code of Conduct for Procurement – Standing Offer
GC 29	Transition to an E-Procurement Solution (EPS)



## GC 1 Definitions

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

**Architectural and Engineering Services** means services to provide a range of investigation and recommendation reports, planning, design, preparation, or supervision of the construction, repair, renovation or restoration of a work and includes contract administration services, for real property projects;

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

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

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

means Her Majesty the Queen in right of Canada as represented by the Minister of Public Works and Government Services and any other person duly authorized to act on behalf of that minister or, if applicable, an appropriate minister to whom the Minister of Public Works and Government Services has delegated his or her powers, duties or functions and any other person duly authorized to act on behalf of that minister;

**Construction Contract** means a contract entered into between *Canada* and a *Contractor* for the construction of the Project;

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

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

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

**Construction Services** means construction, repair, renovation or restoration of any work except a vessel and includes; the supply and erection of a prefabricated structure; dredging; demolition; environmental services related to a real property; or, the hire of equipment to be used in or incidentally to the execution of any construction services referred to above;

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

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

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

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

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

---

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

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

**Experience** means accumulated, over an extended period of time, involvement in a specific type of technical/managerial activity.

**Expertise** means the sum of knowledge, skills, know-how, proficiency and capability possessed by an expert in a particular technical/managerial field and/or speciality.

**Facility Maintenance Services** means services related to activities normally associated with the maintenance of a facility and keeping spaces, structures and infrastructure in proper operating condition in a routine, scheduled, or anticipated fashion to prevent failure and degradation including inspection, testing, servicing, classification as to serviceability, repairs, rebuilding and reclamation, as well as cleaning, waste removal, snow removal, lawn care, replacement of flooring, lighting or plumbing fixtures, painting and other minor works;

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

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

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

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

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

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

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

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

## **GC 2 Interpretations**

1. Words importing the singular only also include the plural, and vice versa, where the context requires;

2. Headings or notes in the Standing Offer shall not be deemed to be part thereof, or be taken into consideration in its interpretation;
3. "Herein", "hereby", "hereof", "hereunder" and similar expressions refer to the Standing Offer as a whole and not to any particular subdivision or part thereof.

### **GC 3 Not Applicable**

### **GC 4 Assignment**

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

### **GC 5 Indemnification**

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

### **GC 6 Notices**

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

### **GC 7 Suspension**

1. Canada may, in Canada's sole and absolute discretion, suspend the *Services* being provided, or any part thereof, for a specified or unspecified period, by giving notice of suspension in writing to the *Consultant*. The *Consultant* shall not be entitled to be paid any amount whatsoever for a suspension, other than such amount, if any, payable to the *Consultant* in accordance with Suspension Costs provisions in TP8 of clause 9998DA, Terms of Payment.
2. If a period of suspension does not exceed sixty (60) days and when taken together with other periods of suspension does not exceed ninety (90) days, the *Consultant* shall, upon the expiration of that period, resume the performance of the *Services* in accordance with the terms of the Standing Offer and the relevant Call-up.
3. If a period of suspension exceeds sixty (60) days, or when taken together with other periods of suspension the total exceeds ninety (90) days, Canada and the *Consultant* may agree that the

performance of the Services shall be continued by the Consultant, and the Consultant shall resume performance of the Services, subject only to such terms and conditions agreed upon by Canada and the Consultant in writing.

If Canada and the Consultant do not agree that performance of the Services shall be continued by the Consultant, or upon the terms and conditions under which the Consultant shall continue the Services, the notice of suspension shall be deemed to be a notice of termination in accordance with the terms of GC 8. For clarity, Termination Costs in TP 9 of clause 9998DA, Terms of Payment shall be without duplication of Suspension Costs provisions in TP8 of clause 9998DA, Terms of Payment.

## **GC 8 Termination**

Canada may, in Canada's sole and absolute discretion, terminate any Call-up at any time by giving notice of termination in writing to the Consultant. The Consultant shall not be paid any amount whatsoever for a termination, other than such amount, if any, payable to the Consultant in accordance with the Termination Costs provisions in TP 9 of clause 9998DA, Terms of Payment.

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

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

---

from the due date referred to in TP 2 of clause 9998DA, Terms of Payment, and in accordance with the terms of the Standing Offer.

7. The taking of the *Services*, or any part thereof, out of the *Consultant's* hands does not relieve or discharge the *Consultant* from any obligation under the Standing Offer, the Call-up, or imposed upon the *Consultant* by law, in respect to the *Services* or any part thereof that the *Consultant* has performed.

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

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

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

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

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

1. Definitions

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

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

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

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

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

## 2. Identification and Disclosure of Foreground

The *Consultant* shall:

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

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

## 3. IP Rights Vest with *Consultant*

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

## 4. Ownership Rights in Deliverables

Notwithstanding the *Consultant's* ownership of the IP Rights in the Foreground that is a prototype, built work, building, structure, facility, model or custom or customized system or equipment together with associated manuals and other operating and maintenance documents and tools,

---

*Canada* shall have unrestricted ownership rights in those deliverables, including the right to make them available for public use, whether for a fee or otherwise, and the right to sell them.

5. Licence to Foreground

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

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

6. Licence to Foreground for Other Projects

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

7. Licence to Background

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

- (a) for the purposes contemplated in article GC 12.5 and GC 12.6;

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

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

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

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

9. *Consultant's Right to Grant Licence*

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

10. Trade Secrets and Confidential Information

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

11. *Canada Supplied Information*

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



---

and conditions to be negotiated between the parties including payment of compensation to *Canada*.

12. Transfer of IP Rights

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

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

- 1. The *Consultant* declares that the *Consultant* has no pecuniary interest in the business of any third party that would cause, or seem to cause, a conflict of interest in carrying out the *Services*, and should such an interest be acquired during the life of the Standing Offer, the *Consultant* shall declare it immediately to the *Departmental Representative*.
- 2. The *Consultant* shall not have any tests or investigations carried out by any persons, firms, or corporations, that may have a direct or indirect financial interest in the results of those tests or investigations.
- 3. The *Consultant* shall not submit, either directly or indirectly, a bid for any Construction Contract related to the Project.

4. The Consultant acknowledges that individuals who are subject to the provisions of the Conflict of Interest Act, 2006, c. 9, s.2, the Conflict of Interest Code for Members of the House of Commons, the Values and Ethics Code for the Public Services, or all other codes of values and ethics applicable within specific organizations cannot derive any direct benefit resulting from the Standing Offer or subsequent Call-ups.
5.
  - (a) The Consultant shall not be eligible to compete as a consultant or sub-consultant for a project which may result from the provision of the Services if the Consultant is involved in the development of a Project Brief or Terms of Reference, a Request for Proposal or similar documents for such project.
  - (b) The Consultant providing certain pre-design services (e.g. studies, analysis, schematic design) that do not involve the development of a Project Brief or Terms of Reference, a Request for Proposal or similar documents for such project may be eligible to compete as a consultant or sub-consultant for a project which may result from the provision of these services. The experience acquired by a Consultant who has only provided pre-design services, where the information / documentation resulting from these services is made available to other proponents, will not be considered by Canada as conferring an unfair advantage or creating a conflict of interest.

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

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

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

The *Consultant* declares that:

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

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

1. General
  - a) The Consultant shall ensure that appropriate liability insurance coverage is in place to cover the consultant and the members of the consultant team and shall maintain all required insurance policies as specified herein.
  - b) The Consultant shall, if requested by the Contracting Officer at any time, provide to the Contracting Officer an Insurer's Certificate of Insurance and/or the originals or certified true copies of all contracts of insurance maintained by the Consultant pursuant to the provisions contained herein.

- c) The payment of monies up to the deductible amount made in satisfaction of a claim shall be borne by the Consultant.
- d) Any insurance coverages additional to those required herein that the Consultant and the other members of the consultant team may deem necessary for their own protection or to fulfill their obligations shall be at their own discretion and expense.

2. Commercial General Liability

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

3. Professional Liability

- a) The Professional Liability insurance coverage shall be in an amount usual for the nature and scope of the Services but, shall have a limit of liability of not less than \$1,000,000 per claim, and be continually maintained from the commencement of performance of the Services until five (5) years after their completion.
- b) Notice of Cancellation of Insurance Coverage: The Consultant shall immediately advise the Contracting Authority in writing upon being informed or in receipt of any notification of a pending cancellation of its professional Liability insurance or of any reduction to the claim limits it maintains.

**GC 17 Resolution of Disagreements**

- 1. In the event of a disagreement regarding any aspect of the *Services* or any instructions given under the Standing Offer and subsequent Call-ups:
  - (a) The *Consultant* may give a notice of disagreement to the *Departmental Representative*. Such notice shall be promptly given and contain the particulars of the disagreement, any changes in time or amounts claimed, and reference to the relevant clauses of the Standing Offer and Call-up;
  - (b) The *Consultant* shall continue to perform the *Services* in accordance with the instructions of the *Departmental Representative*; and
  - (c) The *Consultant* and the *Departmental Representative* shall attempt to resolve the disagreement by negotiations conducted in good faith. The negotiations shall be conducted, first, at the level of the *Consultant's* project representative and the *Departmental Representative* and, secondly and if necessary, at the level of a principal of the *Consultant* firm and a senior departmental manager.
- 2. The *Consultant's* continued performance of the *Services* in accordance with the instructions of the *Departmental Representative* shall not jeopardize the legal position of the *Consultant* in any disagreement.
- 3. If it was subsequently agreed or determined that the instructions given were in error or contrary to the Standing Offer or Call-up, *Canada* shall pay the *Consultant* those fees the *Consultant* shall have earned as a result of the change(s) in the *Services* provided, together with those reasonable

---

disbursements arising from the change(s) and which have been authorized by the *Departmental Representative*.

4. The fees mentioned in GC 17.3 shall be calculated in accordance with the Terms of Payment set out in the Standing Offer and the relevant Call-up.
5. If the disagreement is not settled, the *Consultant* may make a request to the *Departmental Representative* for a written departmental decision and the *Departmental Representative* shall give notice of the departmental decision within fourteen (14) *days* of receiving the request, setting out the particulars of the response and any relevant clauses of the Standing Offer or Call-up.
6. Within fourteen (14) *days* of receipt of the written departmental decision, the *Consultant* shall notify the *Departmental Representative* if the *Consultant* accepts or rejects the decision.
7. If the *Consultant* rejects the departmental decision, the *Consultant*, by notice may refer the disagreement to *Mediation*.
8. If the disagreement is referred to *Mediation*, the *Mediation* shall be conducted with the assistance of a skilled and experienced mediator chosen by the *Consultant* from a list of mediators proposed by Canada, and departmental *Mediation* procedures shall be used unless the parties agree otherwise.
9. Negotiations conducted under the Standing Offer and any resulting Call-up, including those conducted during *Mediation*, shall be without prejudice.

#### **GC 18 Amendments**

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

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

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

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

The Consultant certifies that it has not, directly or indirectly, paid or agreed to pay and agrees that it will not, directly or indirectly, pay a contingency fee for the solicitation, negotiation or obtaining of the Standing Offer to any person, other than an employee of the Consultant acting in the normal course of the employee's duties. In this section, "contingency fee" means any payment or other compensation that depends or is calculated based on a degree of success in soliciting, negotiating or obtaining the Standing Offer and "person" includes any individual who is required to file a return with the registrar pursuant to section 5 of the Lobbying Act, 1985, c. 44 (4th Supplement).

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

1. The Consultant acknowledges the responsibility of Canada to ensure, for its employees, a healthy work environment, free of harassment. A copy of the Treasury Board policy, the Policy on the Prevention and Resolution of Harassment in the Workplace, which is also applicable to the Consultant, is available on the Treasury Board Web site.

2. The Consultant must not, either as an individual, or as a corporate or unincorporated entity, through its employees or subconsultants, harass, abuse, threaten, discriminate against or intimidate any employee, consultant or other individual employed by, or under contract with Canada. The Consultant will be advised in writing of any complaint and will have the right to respond in writing. Upon receipt of the Consultant's response, the Contracting Authority will, at its entire discretion, determine if the complaint is founded and decide on any action to be taken.

## **GC 22 Taxes**

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

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

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

1. Should an entity or person named in the Consultant's proposal as an entity or person who is to perform the *Services* or part of the *Services* be unable to perform or complete the *Services*, the *Consultant* shall obtain the concurrence of the *Departmental Representative* prior to performing or completing the *Services*, or entering into an agreement with another equally qualified entity or person to perform or complete the *Services*, such concurrence not to be unreasonably withheld.
2. In seeking to obtain the concurrence of the *Departmental Representative* referred to in paragraph 1, the *Consultant* shall provide notice in writing to the *Departmental Representative* containing:
  - (a) the reason for the inability of the entity or person to perform the *Services*;
  - (b) the name, demonstration of equivalent qualifications, experience and expertise of the proposed replacement entity or person, and

- 
- (c) if applicable, proof that the entity or person has the required security clearance granted by *Canada*.
3. The *Consultant* shall not, in any event, allow performance of any part of the *Services* by unauthorized replacement entities or persons, and acceptance of a replacement entity or person by the *Departmental Representative* shall not relieve the *Consultant* from responsibility to perform the *Services*.
4. The *Departmental Representative*, with the authority of Canada, may order the removal from the *Consultant* team of any unauthorized replacement entity or person and the *Consultant* shall immediately remove the entity or person from the performance of the *Services* and shall, in accordance with paragraphs 1. and 2., secure a further replacement.
5. The fact that the *Departmental Representative* does not order the removal of a replacement entity or person from the performance of the *Services* shall not relieve the *Consultant* from the *Consultant's* responsibility to meet all the *Consultant's* obligations in the performance of the *Services*.

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

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

#### **GC 25 Performance evaluation - contract**

1. The performance of the *Consultant* during and upon completion of the services will be evaluated by Canada. The evaluation includes all or some of the following criteria:
- design
  - quality of Results
  - management
  - time
  - cost
2. A weighting factor of 20 points will be assigned to each of the five criteria as follows:
- unacceptable: 0 to 5 points
  - not satisfactory: 6 to 10 points
  - satisfactory: 11 to 16 points
  - superior: 17 to 20 points
3. The consequences resulting from the performance evaluation are as follows:
- For an overall rating of 85% or higher, a congratulation letter is sent to the *Consultant*.
  - For an overall rating of between 51% and 84%, a standard "meets expectations", letter is sent to the *Consultant*.

- c. For an overall rating of between 30% and 50%, a warning letter is sent to the Consultant indicating that if, within the next two years from the date of the letter, they receive 50% or less on another evaluation, the Consultant may be suspended from any new Public Works and Government Services Canada (PWGSC) solicitations for construction services, architectural and engineering services or facility maintenance services, of real property projects, for a period of one year.
- d. For an overall rating of less than 30%, a suspension letter is sent to the Consultant indicating that the Consultant is suspended from any new PWGSC solicitations for construction services, architectural and engineering services or facility maintenance services, of real property projects, for a period of one year from the date of the letter.
- e. When general average is between 30% and 50% and one of the rating is of 5 points or less on any one criterion, a suspension letter is sent to the Consultant indicating that the Consultant is suspended from any new PWGSC solicitations for construction services, architectural and engineering services or facility maintenance services, of real property projects, for a period of one year from the date of the letter.

The form PWGSC-TPSGC 2913-1, Select - Consultant Performance Evaluation Report (CPEF), is used to record the performance.

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

1. Persons in Canada, and Canadians outside of Canada, are bound by economic sanctions imposed by Canada. As a result, the Government of Canada cannot accept delivery of goods or services that originate, either directly or indirectly, from the countries or persons subject to economic sanctions (<http://www.international.gc.ca/sanctions/index.aspx?lang=eng>).
2. The Consultant must not supply to the Government of Canada any goods or services which are subject to economic sanctions.
3. The Consultant must comply with changes to the regulations imposed during the period of the Call-Up. The Consultant must immediately advise Canada if it is unable to perform the Services as a result of the imposition of economic sanctions against a country or person or the addition of a good or service to the list of sanctioned goods or services. If the parties cannot agree on a work around plan, the Call-Up will be terminated for the convenience of Canada in accordance with terms and conditions of the Standing Offer and/or Call-Up.

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

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

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

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

#### **GC 29 Transition to an E-Procurement Solution (EPS)**

During the period of the Standing Offer, Canada may transition to an EPS for more efficient processing and management of individual call-ups for any or all of the SO's applicable goods and services.

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

Canada reserves the right, at its sole discretion, to make the use of the new e-procurement solution mandatory.

Canada agrees to provide the Offeror with at least a three-month notice to allow for any measures necessary for the integration of the Offer into the EPS. The notice will include a detailed information package indicating the requirements, as well as any applicable guidance and support.

If the Offeror chooses not to offer their goods or services through the e-procurement solution, the Standing Offer may be set aside by Canada.



Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

**0000DA      SUPPLEMENTARY CONDITIONS**

**SC1      Federal Contractors Program for Employment Equity - Setting aside and Default by the Consultant**

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

---

**9998DA TERMS OF PAYMENT**

**TP 1 Fees**

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

**TP 2 Payments to the Consultant**

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

**TP 3 Delayed Payment**

1. If *Canada* delays in making a payment that is due in accordance with TP 2, the *Consultant* will be entitled to receive interest on the amount that is overdue for the period of time as defined in TP

3.2 including the day previous to the date of payment. Such date of payment shall be deemed to be the date on the cheque given for payment of the overdue amount. An amount is overdue when it is unpaid on the first day following the due date described in TP 2.1.

2. Interest shall be paid automatically on all amounts that are not paid by the due date or fifteen (15) *days* after the *Consultant* has delivered a Statutory Declaration in accordance with TP 2.5 or TP 2.7, whichever is the later.
3. The rate of interest shall be the *Average Bank Rate* plus 3 percent per year on any amount which is overdue pursuant to TP 3.1.

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

1. *Canada* may, in order to discharge lawful obligations of and satisfy lawful claims against the *Consultant* by a *Sub-Consultant*, with whom the *Consultant* has a direct contract, for *Services* rendered to, or on behalf of, the *Consultant*, pay an amount from money that is due and payable to the *Consultant* directly to the claimant *Sub-Consultant*.
2. For the purposes of TP 4.1 a claim shall be considered lawful when it is so determined:
  - (a) by a court of legal jurisdiction, or
  - (b) by an arbitrator duly appointed to arbitrate the said claim, or
  - (c) by a written notice delivered to the *Departmental Representative* and signed by the *Consultant* authorizing payment of the said claim or claims.
3. A payment made pursuant to TP 4.1 is, to the extent of the payment, a discharge of *Canada's* liability to the *Consultant* under a specific Call-up and will be deducted from any amount payable to the *Consultant* under any active Call-up.
4. TP 4.1 shall only apply to claims and obligations
  - (a) The notification of which has set forth the amount claimed to be owing and a full description of the *Services* or a part of the *Services* for which the claimant has not been paid. The notification must be received by the *Departmental Representative* in writing before the final payment is made to the *Consultant* and within one hundred twenty (120) *days* of the date on which the claimant
    - (1) should have been paid in full under the claimant's agreement with the *Consultant* where the claim is for an amount that was lawfully required to be held back from the claimant; or
    - (2) performed the last of the *Services* pursuant to the claimant's agreement with the *Consultant* where the claim is not for an amount referred to in TP 4.4(a)(1), and
  - (b) the proceedings to determine the right to payment of which shall have commenced within one year from the date that the notification referred to in TP 4.4(a) was received by the *Departmental Representative*.
5. *Canada* may, upon receipt of a notification of claim referred to in TP 4.4(a), withhold from any amount that is due and payable to the *Consultant* pursuant to a Call-up the full amount of the claim or any portion thereof.
6. The *Departmental Representative* shall notify the *Consultant* in writing of receipt of any notification of claim and of the intention of *Canada* to withhold funds pursuant to TP 4.5. The *Consultant* may, at any time thereafter and until payment is made to the claimant, post with *Canada*, security in a form acceptable to *Canada* in an amount equal to the value of the said claim. Upon receipt of such

---

security *Canada* shall release to the *Consultant* any funds which would be otherwise payable to the *Consultant*, that were withheld pursuant to the provision of TP 4.5.

7. The *Consultant* shall discharge all lawful obligations and shall satisfy all lawful claims against the *Consultant* for *Services* rendered to, or on behalf of, the *Consultant* in respect of this Standing Offer at least as often as this Standing Offer requires *Canada* to discharge its obligations to the *Consultant*.

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

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

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

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

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

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

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

- 1.

In the event of a suspension of any *Services* pursuant to GC 7 of clause 0220DA, General Conditions, *Canada* shall pay:

- (a) for clarity, an amount based on these Terms of Payment, for *Services* satisfactorily performed before the date of suspension; and
  - (b) those out-of-pocket costs and expenses that, in the opinion of *Canada*, are substantiated as having been reasonably incurred during the suspension period, as more particularly provided for in TP 8.2, .3, and .4.
2. The *Consultant* shall minimize all TP8 1(b) out-of-pocket costs and expenses.
3. Within fourteen (14) days of notice of such suspension, the *Consultant* shall submit to the Departmental Representative a schedule of all out-of-pocket costs and expenses, if any, that the *Consultant* expects to incur during the period of suspension, and for which the *Consultant* will request reimbursement, failing which, the *Consultant* shall, for all purposes, be deemed to have no such costs and expenses.

- 
4. Save and except for the specified payment provided for in TP8 (1b), if any, the Consultant shall not be paid and has no claim for damages, compensation, loss of profit, loss of opportunity, allowance or otherwise by reason of, or directly or indirectly arising out of, the suspension of Services pursuant to GC 7 of clause 0220DA, General Conditions.

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

1.

In the event of termination of any Call-up pursuant to GC 8 of clause 0220DA, General Conditions, Canada shall pay, and the Consultant shall accept in full settlement:

- (a) an amount based on these Terms of Payment, for Services satisfactorily performed before the date of termination; and
  - (b) the reasonable out-of-pocket costs and expenses that, in the opinion of Canada, are substantiated as having been reasonably incurred to terminate the Call-Up, as more particularly provided for in TP9 (2), (3), (4) and (5).
2. The Consultant shall minimize all TP 9(1)(b) out-of-pocket costs and expenses.
3. Within fourteen (14) days of notice of such termination, the Consultant shall submit to the Departmental Representative a schedule of all out-of-pocket costs and expenses, if any, reasonably incurred after the date of termination, failing which, the Consultant shall, for all purposes, be deemed to have no such costs and expenses.
4. Payment shall be made to the Consultant only for those out-of-pocket costs and expenses that in the opinion of Canada are substantiated as having been reasonably incurred after the date of termination of the Call-Up.
5. Save and except for the specified payment provided for in TP 9(1), if any, the Consultant shall not be paid any amount and has no claim for damages, compensation, loss of profit, loss of opportunity, allowance or otherwise by reason of, or directly or indirectly arising out of, the termination of any Call-up pursuant to GC 8 of clause 0220DA, General Conditions.

#### **TP 10 Disbursements**

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

- (g) taxi charges;
- (h) travel time; and
- (i) local project office.

2. Subject to any provisions specifically to the contrary in the Supplementary Conditions, the following disbursements reasonably incurred by the Consultant, that are related to the Services and approved by the Departmental Representative, shall be reimbursed to the Consultant at actual cost:

- (a) reproduction and delivery costs of drawings, CADD files, specifications and other Technical Documentation additional to that specified in the Standing Offer Brief;  
  
transportation costs for material samples and models, and courier and delivery charges, for deliverables additional to those specified in the Standing Offer Brief;
- (b) Travel and Living Expenses: Firms are advised that any travel-related expenses associated with the delivery of services will be calculated from the applicable government location (listed below) and/or from the Consultant's closest branch office to the project site, which ever is closer. Travel-related expenses will be paid (with prior approval of the Departmental Representative) in accordance with current National Joint Council (NJC) Travel Directive (<http://www.njc-cnm.gc.ca/directive/index.php?dlabel=travel-voyage&lang=eng&did=10&merge=2>); and

The government locations that will be used to calculate disbursements related to travel and living expenses for each region identified in the Standing Offer is listed below:

Central Ontario: 4900 Yonge Street, Toronto, Ontario  
Eastern Ontario: 86 Clarence Street, Kingston, Ontario  
South Western Ontario: 457 Richmond Street, London, Ontario  
Northern Ontario: 19 Lisgar St., Sudbury for projects east of 86o longitude i.e. Sault St. Marie, Sudbury, North Bay, Timmins and Kirkland Lake; 130 South Syndicate Ave, Thunder Bay for projects west of 86o longitude i.e. Thunder Bay, Kenora, Fort Frances, Red Lake

- (d) Additional services' disbursements as authorised by the Departmental Representative, including Sub-Consultants and Specialists, required in support of the requested services under a call-up and which cannot be covered under the fixed hourly rate established under the Standing Offer such as diving inspections, drilling/coring contractor, barge rental, material and/or in-situ testing services etc. The cost for these services shall be administered as follows;
  - i) Unless otherwise authorized by the Departmental Representative, the above mentioned disbursements shall be obtained through competitive bidding with a minimum of two (2) quotes. Copies of all quotes shall be submitted together with the Consultant proposal for the call-up; or
  - ii) The disbursements shall be evaluated such that, in the event that competitive quotes are not obtained, the Consultant shall submit copies of invoices from other projects to help demonstrate the quote to be a fair, reasonable and competitive price.
- (e) other disbursements made with the prior approval of the *Departmental Representative*.

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

3. Disbursements shall be Project related and shall not include expenses that are related to the normal operation of the Consultant's business. The amounts payable, shall not exceed the amount entered in the Call-up, without the prior authorization of the Departmental Representative.

---

**9999DA CONSULTANT SERVICES**

**CS 1 Services**

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

**CS 2 Standard of Care**

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

**CS 3 Time Schedule**

The *Consultant* shall:

- (a) submit in a timely manner to the *Departmental Representative*, for approval, a time schedule for the *Services* to be performed, in detail appropriate to the size and complexity of the Project, and in a format as requested by the *Departmental Representative*;
- (b) adhere to the approved time schedule and, if changes in the approved time schedule become necessary, indicate the extent of, and the reasons for such changes, and obtain the approval of the *Departmental Representative*. If deemed not sufficiently justified or avoidable, the *Departmental Representative* may deny Consultant's request for schedule change(s);
- (c) ensure personnel availability at all times. Shortfall in availability of originally designated personnel or of additional personnel at the Consultant's branch office(s), and/or underperformance/delays caused by external sub-Consultants and/or Specialists may not constitute sufficient grounds for delivery schedule revision, as the Consultant's Standing Offer Manager (refer to AA 1.1.2.1) is to take all the necessary steps and efforts, including mobilisation of additional personnel and/or appropriate substitutions of employees and firms, to achieve the original, approved time schedule.

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

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

**CS 5 Changes in Services**

The *Consultant* shall:

- (a) make changes in the *Services* to be provided for the Project, including changes which may increase or decrease the original scope of *Services*, when requested in writing by the *Departmental Representative*; and



- 
- (b) prior to commencing such changes, advise the *Departmental Representative* of any known and anticipated effects of the changes on the *Construction Cost Estimate*, *Consultant fees*, *Project Schedule*, and other matters concerning the Project.

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

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

## **CS 7 Provision of Staff**

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

## **CS 8 Sub-Consultants**

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

## **CS 9 Cost Control**

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

1. Throughout Project development, the *Construction Cost Estimate* prepared by the *Consultant* shall not exceed the *Construction Cost Limit*.
2. In the event that the *Consultant* considers that the *Construction Cost Estimate* will exceed the *Construction Cost Limit*, the *Consultant* shall notify the *Departmental Representative* and

- 
- (a) if the excess is due to factors under the control of, or reasonably foreseeable by the *Consultant*, the *Consultant* shall, if requested by the *Departmental Representative*, and at no additional cost to *Canada*, make such changes or revisions to the design as may be necessary to bring the *Construction Cost Estimate* within the *Construction Cost Limit*; or
- (b) if the excess is due to factors that are not under the control of the *Consultant*, changes or revisions may be requested by the *Departmental Representative*. Such changes or revisions shall be undertaken by the *Consultant* at *Canada's* expense, and the cost involved shall become an amount to be mutually agreed, prior to performance of the said changes or revisions.
3. If the lowest price obtained by bid process or negotiation exceeds the *Construction Cost Limit*, and if the excess is due to reasons within the control of, or reasonably foreseeable by the *Consultant*, the *Consultant* shall, if requested by the *Departmental Representative*, and without additional charge, be fully responsible for revising the Project scope and quality as required to reduce the construction cost and shall modify the construction documents as necessary to comply with the *Construction Cost Limit*.

---

## 2000DA CALCULATION OF FEES

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

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

### CF 2 Payments for Services

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

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

## **STANDING OFFER BRIEF**

Agreement Description (AD)  
Agreement Administration (AA)  
Required Services (RS)

---

## **AGREEMENT DESCRIPTION (AD)**

### **AD 1 Introduction**

#### **AD 1.1 General Objectives**

#### **AD 1.2 Consultant Team**

### **AD 1 INTRODUCTION**

#### **AD 1.1 GENERAL OBJECTIVES**

The Consultant shall be the Prime Architectural Services Consultant who will render the services of this Standing Offer in conjunction with the support of the services of sub-consultants such as Functional Programmer, Interior Designer, engineering disciplines including Structural, Mechanical, Electrical, Information Technology (IT) and Telecommunications, and other specialized services consultants for Central, Eastern, Southwestern or Northern Ontario Regions.

Individual commissions will provide support to Government of Canada (GC) Departments and Agencies and may include one or more of the Scope of Services listed in RS 2 related to Architectural services. The Consultant and its sub-consultants will provide the Basic Services and Additional Services listed in RS 2. The Consultant will also demonstrate experience and good working relationships with other firms providing services in the Specialized Services listed in RS 2.

Please be advised that, in general, any Architectural services provided must be complete in that they identify all major issues that will have a significant impact on the project. This will promote a surprise-free environment which will enhance the success of project implementation. Also, please note that the Canadian Federal Government continues to ensure that sustainable development principles are built into the policy of the federal organizations. The previous Government of Canada Fit-Up Standards have been revised recently and are now referred to as the "GCworkplace Fit-Up Standards". The Consultant will be expected to incorporate sustainable design principles and the revised Fit-Up Standards for office space in their project solutions.

#### **AD 1.2 CONSULTANT TEAM**

1. The Consultant Team for this Standing Offer must provide the following services related to Architectural Services:
  - (a) Architectural design - provide architectural design services to carry out investigations, feasibility studies, develop options, designs and contract documents for the design of new and/or existing buildings with the assistance of other disciplines and specialists.
  - (b) Structural Engineering - provide structural engineering services to carry out inspections, investigations, design and analysis of building structures. Develop drawings and specifications for the new and existing buildings to relevant codes and standards.
  - (c) Mechanical Engineering – provide mechanical engineering services to carry out inspection, investigation, design and analysis of mechanical systems of new and existing buildings. Development of drawings and specifications for the design of new or existing buildings to relevant codes and standards.
  - (d) Electrical Engineering - provide electrical engineering services to carry out inspection, investigation, design and analysis of electrical systems associated with new and existing buildings. Develop design and contract drawings and specifications for the

---

design/repair/rehabilitation of electrical systems in new or existing buildings to relevant codes and standards.

- (e) Information Technology / Telecommunications - provide IT and telecommunications services to carry out inspection, investigation, design of telecommunications systems in buildings for renovations and new construction.
  - (f) Sustainable Design Specialist - as a LEED Accredited Professional or equivalent provide advisory and integrated design services for both project integrated and standalone sustainable design advice.
  - (g) Functional Programming - provide both project integrated and standalone functional programming services for renovations and new construction.
  - (h) Interior Design - provide both project integrated and standalone interior design services renovations and new construction.
  - (i) Specification Writing - provide both project integrated and standalone specification writing services using the National Master Specification (NMS) system (refer to Doing Business with PWGSC document as attached to Appendix D). The specification writer should be fully versed with the NMS system format and the 50 Division format.
  - (j) Cost Estimating Specialist - provide both project integrated and stand alone cost estimating services. Cost estimating specialist should be a member of Canadian Institute of Quantity Surveyors.
  - (k) Heritage Conservation Specialist - provide both project integrated and standalone services in heritage conservation to provide heritage advice on projects in designated federal heritage buildings, prepare building envelope screening reports, recommend strategies to limit the visual and physical impact on the heritage values and character defining elements, and complete heritage recording as required.
  - (l) Building Envelope Specialist - provide both project integrated and standalone services in providing advice on proposed designs, assessing existing building envelope condition for repairs or replacement of building elements and preparing building screening reports.
2. The Consultant Team may be augmented/supported by other specialties or services as required by the work under the individual Call-Ups, and as agreed to by the Departmental Representative.

---

## **AGREEMENT ADMINISTRATION (AA)**

### **AA 1 General Information**

- AA 1.1 Roles and Responsibilities
- AA 1.2 Coordination with Departmental Representative
- AA 1.3 Health and Safety
- AA 1.4 Project Response Time Requirements
- AA 1.5 Official Languages

### **AA 2 Functional Requirements**

- AA 2.1 Design Codes, Regulations and Reference Documents
- AA 2.2 Project Delivery Approach
- AA 2.3 Media
- AA 2.4 General Project Deliverable
- AA 2.5 Acceptance of Project Deliverables

## **AA 1 GENERAL INFORMATION**

### **AA 1.1 ROLES AND RESPONSIBILITIES**

#### **AA 1.1.1 DEPARTMENTAL REPRESENTATIVE**

1. The Project Manager assigned to the project is the Departmental Representative.
2. The Departmental Representative, as determined on a project by project basis, 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 Project Brief or Terms of Reference which have previously been reviewed and accepted.

#### **AA 1.1.2 CONSULTANT**

1. The Architectural Prime Consultant shall be responsible for the project delivery of the Consultant Team's services, including management, administration, coordination and reporting of the activities by the Consultant Team as set out in this document.
2. The Consultant shall be responsible for gathering and identifying the needs of the Client Department/agency and incorporating those needs into the required project deliverables once written acceptance is issued by the Departmental Representative.
3. The Consultant shall establish and maintain, throughout the duration of each project, a team capable of effectively delivering the services described in this document.
4. The Consultant shall deliver the project within the time frame and assigned budget in accordance with the approved plan agreed to by the Departmental Representative.
5. Upon execution of the Consultant Call-Up, the Consultant shall be responsible for producing all work described in the Call-up document, in a conscientious and professional manner.
6. The Consultant shall coordinate project requirements with any other adjacent and site work that may be underway.

---

#### **AA 1.1.2.1 CONSULTANT STANDING OFFER MANAGER**

The Consultant Standing Offer Manager, who is permanently based at the Consultant's location, and holds a Senior Executive position in the Consultant's organization, at minimum shall:

1. Be the primary contact and the recipient of individual Call-ups under the Standing Offer, and be the formal issuer of Consultant's proposal or refusal in regards to all Call-ups.
2. Ensure that each individual call-up is responded to with a binding "yes" or a "no" within five (5) working days of its issue to the Consultant. Ensure that call-up proposal is submitted by the Consultant by the deadline stipulated by the Departmental Representative, of the call-up issue.
3. Be the primary contact for the Departmental Representative regarding performance and/or quality issues arising during a call-up project execution by the Consultant Team. A maximum response/contact time of 72 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 work delivered by the Consultant Team at all times, through on-going internal Quality Reviews. Ensure proper coordination of work and deliverables between all disciplines.
6. Ensure a comprehensive, in-depth approach to all matters pertaining to public safety and to the mandate of a Call-up.
7. Ensure timely commencement and deliveries of every portion of all projects, and timely overall project completion on each Call-up.
8. Ensure quick response time, prompt execution and on-schedule completion of all work 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.

The Contracting Authority and the Departmental Representative must be informed in writing by the Consultant of a departure of Consultant's Standing Offer Manager within five (5) working days of such departure.

#### **AA 1.1.2.2 CONSULTANT'S CALL-UP TEAM LEADER**

1. For each accepted call-up, a Call-up Team Leader is to be designated from among senior staff of the Consultant's firm unless otherwise specified by the Departmental Representative.
2. The designated Call-up Team Leader is to be in full control of Call-up project time assignments for each individual member of the Consultant's Team proposed for a specific call-up, irrespective of and overriding member's physical location, departmental designation and otherwise normal supervisor/manager assignment.



---

### **AA 1.1.3 GENERAL INSTRUCTIONS**

For any of the Required Services listed in RS 2, the Consultant shall:

1. Attend/Chair regular project status meetings during the life of the project and prepare and distribute minutes in a timely fashion.
2. Submit weekly project progress reports to the Departmental Representative.
3. **When the 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, request approval of the Departmental Representative prior to incorporation in the design.**
4. All design work prepared by the Consultant and his sub-consultants and specialists shall 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).

### **AA 1.2 COORDINATION WITH DEPARTMENTAL REPRESENTATIVE**

The Consultant shall:

1. Carry out services in accordance with approved documents and directions given by the Departmental Representative.
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 depending on the project particulars.
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.

### **AA 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. In order to meet those responsibilities, PWGSC insists that their consultants implement due diligence to help ensure that roles and responsibilities assigned under Part II of the Canada Labour Code and the Canada Occupations Health and Safety Regulations are implemented and observed when involving consultant staff to undertake works on federal sites and work places.

### **AA 1.4 PROJECT RESPONSE TIME REQUIREMENTS**

1. Unless otherwise stated by the Departmental Representative, the Consultant is required to respond within five (5) working days in writing to the Departmental Representative to confirm acceptance or

---

refusal of the Call-Up. Failure to respond within the five (5) working day deadline will constitute the Consultant's refusal to accept the Call-up.

If accepted, the Consultant will be provided the scope of services and given a reasonable deadline for submission of a proposal. The proposal 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 either the response deadline or the submission deadline in a timely manner.

2. The Consultant must be able to demonstrate the availability of adequate resources within their proposed team(s) to deliver the scope of services outlined in this Standing Offer in a timely fashion.
3. It is a requirement of all projects covered under this Standing Offer that the prime Consultant and their proposed sub-consultants be personally available to attend meetings and respond to inquiries within 72 hours of being given notice by the Departmental Representative.

## **AA 1.5 OFFICIAL LANGUAGES**

This Standing Offer requires services in the English language.

## **AA 2 FUNCTIONAL REQUIREMENTS**

### **AA 2.1 DESIGN CODES, REGULATIONS AND REFERENCE DOCUMENTS**

1. The Consultant shall comply with all statutes, codes, regulations, standards, guidelines and by-laws applicable to the design and where necessary, shall review the design with those public authorities having jurisdiction in order that the consents, approvals, licenses and permits required for the project may be applied for and obtained.
2. The Consultant shall utilize the latest editions of the applicable codes, standards, guidelines, regulations and by-laws. Public authorities having jurisdiction shall review the design in order 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.
3. The Consultant shall identify other jurisdictions appropriate to the project.

### **AA 2.2 PROJECT DELIVERY APPROACH**

1. Unless otherwise specified in the Call-Up, the traditional design-tender-build approach will be used. The Consultant may be required to prepare the tender package and ensure full coordination.
2. PWGSC will tender contracts through several contracting authorities.

### **AA 2.3 MEDIA**

1. The Consultant shall not respond to requests for project related information or questions from the media. Such inquiries are to be directed to the Departmental Representative.

### **AA 2.4 GENERAL PROJECT DELIVERABLE**

1. Where deliverables and submissions are required under the Call-Ups, they shall be submitted in accordance with the Standing Offer. Additional details and/or requirements may be specified in the Call-Up.

2. All specifications and drawings will be generated and distributed in the format using layering and file protocols as prescribed in the "Doing Business with PWGSC", Appendix D to the Standing Offer.
3. Unless otherwise indicated in the Call-Up or in the Standing Offer, provide four (4) copies of all deliverables plus one electronic version in a format using PWGSC operational platforms such as: Microsoft (Word and Excel), MS Project, AutoCADD latest version and NMS latest version. In addition provide PDF electronic copy of all final reports and contract documents. All submissions and electronic documents shall 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. The standards in the PWGSC document "Doing Business with PWGSC" and requirements at each project delivery stage as described in each individual Call-up must be adhered to in conjunction with this scope of services.

All documents are to be produced in the amounts and types shown below and at the project delivery stage described in each individual Call-up.

	hard copies Hard copies	CADD files PDF files	PDF File	
Reports (i.e. Feasibility Studies, Building Assessments, Functional Programs)	.....4.....	.....1.....		
Design Concept Documents No. of copies	Hard copies .....4.....	CADD files .....1.....	PDF File .....1.....	
Design Development Documents No. of copies:	Hard copies .....4.....	CADD files .....1.....	PDF File .....1.....	
Construction Documents No. of copies:	Hard copies	CADD files	PDF File	NMS spp file
33% to 66% complete	.....4.....	.....1.....	.....1.....	
99% complete	.....4.....	.....1.....	.....1.....	.....1.....
100% complete	.....4.....	.....1.....	.....1.....	.....1.....
Tender Documents No. of copies:	Hard copies	CADD files	PDF File	NMS spp file
Drawings	.....1.....	.....1.....	.....1.....	
Specifications	...1 bound...	.....1.....	.....1.....	.....1.....
Specifications	...1 unbound..			
Record Documents No. of copies	Hard copies .....1.....	CADD files .....1.....	PDF File .....1.....	NMS spp file .....1.....

---

The schedule for the delivery of services will be determined at the time of each individual Call-up.

## **AA 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 work. PWGSC reserves the right to reject undesirable or unsatisfactory work. The Consultant must obtain Departmental Representative acceptances during each of the project stages.
2. Acceptances indicate that based on a general review of material for specific issues, the material is considered to comply with governmental and departmental objectives and practices, and that overall project objectives are being satisfied.
3. The acceptance does not relieve the Consultant of professional responsibility for the work and compliance with the contract.
4. PWGSC acceptances do not prohibit rejection of work, which is determined to be unsatisfactory at later stages of review. If progressive design development or time / cost / risk updates or technical investigation reveals that earlier acceptances must be withdrawn (as a result of undiscovered Consultant mistake, error or disregard of requirements/requests), the Consultant is responsible for redesigning work and resubmitting for acceptance at the Consultant's cost
5. 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.

---

## REQUIRED SERVICES (RS)

### RS 1 INTRODUCTION

Consultant shall provide all the required services listed in this Standing Offer 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 Call-Up.

### RS 2 SCOPE OF SERVICES:

1. Call-ups may include any or all of the following Basic, Additional or Specialized Services. Specific services will be identified and customized to suit particular requirements in each Call-up:

#### RS 2.1 Basic 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
- 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 Strategies and 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
- RS 2.2.12 Materials and Systems Testing
- RS 2.2.13 Coordination of other sub-consultants and specialists
- RS 2.2.14 Administration of multiple contracts
- RS 2.2.15 Compliance / Technical / Peer Reviews
- RS 2.2.16 Other Additional Services

#### RS 2.3 Specialized Services

- 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 Design Specialist
- RS 2.3.7 IT / Telecommunications Specialist
- RS 2.3.8 Building Code Specialist
- RS 2.3.9 Audio-visual Specialist
- RS 2.3.10 Acoustic Specialist
- RS 2.3.11 Security Specialist
- RS 2.3.12 Scheduling Specialist

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

RS 2.3.13	Food Service / Kitchen Consultant
RS 2.3.14	Vertical Transportation Specialist
RS 2.3.15	Wayfinding and signage specialist
RS 2.3.16	Roofing Specialist
RS 2.3.17	Master Planning Services
RS 2.3.18	Other Specialized Services

---

## REQUIRED SERVICES (RS)

### 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 prime 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.

The Consultant shall:

1. Manage and coordinate the design and administration of the project and also ensure that all members of the 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 work 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 and Call-ups may include any or all of these 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. Analyze the Project Brief or the Terms of Reference and advise the Departmental Representative of any noted problems or the need for more information, clarification or direction.
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 on termination of the contract.)**
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.
13. 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 call-up. 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.

### 2.1.1.3 DELIVERABLES:

The Consultant shall:

1. Provide a comprehensive summary of the project requirements/program demonstrating understanding of the scope of work 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.



## **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 alternative design options which are viable and have potential for development.
2. Analyze each solution with regard to the project goals including cost and schedule.
3. Recommend one option for further development with all supporting background and technical justifications.
4. Submit to the Departmental Representative, design concept documents in sufficient detail to illustrate the design concept and to demonstrate compliance with the Project requirements.
5. Submit a preliminary Class C Construction Cost Estimate, Cost Plan and Project Schedule to confirm the feasibility of the Project.
6. Provide copies of all design concept documents in the type and number specified in AA 2.4.
7. Provide drawings that include analytical diagrams, schematic bubble diagrams, plans, elevations, and sections, room names and sizes. Perspective sketches may be requested;
8. Provide option analysis, complete with life cycle cost analysis.
9. Meet and correspond with authorities having jurisdiction and obtain written approvals when required.
10. Recommend a single preferred Conceptual Option for Design Development consideration.

### **2.1.2.3 DELIVERABLES**

The Consultant shall provide the following:

1. Design Concept/Schematic Drawings
2. Description of the options with recommendation of preferred solution
3. Class 'C' Estimate
4. Report on deviation from schedule and recommend corrective measures or updated time line.

### **2.1.2.4 DELIVERABLES - DETAILS**

The Consultant shall provide the following:

#### **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. Proposed or alternative structural systems including foundation methods, explanatory sketches, etc. and a copy of the site report on which the design is based.

#### 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.
7. Identify in square metres 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.

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

2. Identify in square meters 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 Department.
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.
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 AA 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. Two (2) or three (3) building sections
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 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.
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.

##### **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. Drawings may be separate or incorporated on the Architectural sheets. 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.
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.
3. Prepare a Commissioning Brief describing major commissioning activities for mechanical, electrical and integrated system testing.
4. Define and establish project specific archives

---

## **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.

1. 33% indicates technical 33% completeness of all working documents
2. 50% indicates substantial technical development of the project – advanced architectural and engineering plans, details, schedules and specifications
3. 66% indicates substantial technical development of the project - well advanced architectural and engineering plans, details, schedules and specifications
4. 99% is the submission of complete Construction Documents ready for tender call and submission to local authorities for pre-permit purposes
5. Develop project specific Systems Operations Manual (SOM)
6. Final Submission incorporates all revisions required in the 99% version and is intended to provide PWGSC with complete construction documents for tender call.

### **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 Terms of Reference;
  - 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 AA 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 Schedule.
3. Activities are similar at all stages specified in the project Terms of Reference (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 AA 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 Client Department(s) and PWGSC support staff will be present as arranged by the Departmental Representative.
3. Consultant shall ensure that his 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 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 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. The specifications shall consist of typed and edited PWGSC amended NMS sections, PWGSC in-house master specs sections and NMS sections.

##### **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



Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

**.2 Final Submission:**

1. 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.
  - 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 substance survey report.
2. As a safeguard against loss or damage to the originals, retain a complete set of drawings in reproducible form and one copy of the specifications.
3. Inspection Authorities Submission
  - a. Submit and obtain approval on plans and specifications required by Inspection Authorities before tender call.

---

## **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, including Federal Rules for Bid Depositories.

### **2.1.5.2 SCOPE AND ACTIVITIES:**

#### **1. General:**

The Consultant shall:

1. Attend tenderers briefing meeting(s)
2. Prepare addenda based on questions arising in such meetings for issue by the Departmental Representative
3. 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.
4. Keep full notes of all inquiries during the bidding period and submit same to Departmental Representative at the end, for PWGSC records.
5. 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.
6. If PWGSC decides to re-tender the project, provide advice and assistance to the Departmental Representative.
7. Revise and amend, at your cost, the construction documents to bring the cost of the work within the limits stipulated.
8. Examine and report on any cost and schedule impact created by the issue of tender / contract addenda.
9. Provide copies of all documents in the type and number specified in AA 2.4.

#### **2. Tender Call:**

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. The Consultant shall, on request:

- a. provide the Departmental Representative with information required for interpretation and clarification of the construction documents;
- b. assist in the evaluation and approval of equivalent alternative materials, methods and systems;
- c. assist with the preparation of addenda;
- d. attend job or site showings as required.

### **3. Bid Evaluation and Construction Contract Award:**

1. The Departmental Representative shall be responsible for assembling and issuing tender documents and arranging for the receipt of tenders and awarding of the Construction Contract.
2. The Consultant shall, on request:
  - a. review and evaluate the bids received for the construction of the Project, and advise on their relative merits and/or shortcomings.
  - b. provide information to support price negotiations.

#### **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

---

## **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 at intervals appropriate to determine if the work is in conformity with the Contract Documents and the municipality and building code requirements; the number of site visits to be determined at call-up;
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 to all participants and to other persons agreed upon with the Departmental Representative.
2. Call site meetings as frequently as required, commencing with the construction briefing meeting. The meetings should include the job superintendent, Inspector of Construction main sub-subcontractors, affected sub-consultants and Government Services representatives as necessary. Prepare minutes of the meeting and distribute copies to all participants. The Departmental Representative may invite Client Departments 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. Not approve any requests for time extensions. 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 Department 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 involve no increase in cost. Review all requests for changes of sub-contractors, and submit recommendations to the Project Manager.
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. The Consultant shall 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. Matters pertaining to the Department of Labour shall be referred 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-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, as required in order that project not be delayed, 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 Department 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 Department'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 departmental 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.
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 Department. 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 Department 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 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.
4. Upon Departmental approval 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.
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.
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 when satisfied that the project is substantially completed. The Consultant shall ensure that his representative, his sub-consultant representative, Resident On-Site Reviewer, Contractor and major sub-trades representatives shall form part of the Project Acceptance Board and attend all meetings as organized by the Department.

#### 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 for processing.

#### 2.1.6.3.23 Building Occupation

1. The Department or Client Department 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 Department or Client Department (as the case may be) assumes responsibility for:
  - 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 and/or the Client Department as applicable.

#### 2.1.6.3.27 Final Inspection

1. Inform the Department 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.

#### 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 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 PWGSC Project Team which includes the Consultant and the Client Department. 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 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 PWGSC.
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:

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

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

---

## **RS 2.1.7 COMMISSIONING**

### **2.1.7.1 INTENT:**

The Consultant shall provide commissioning services to verify that the Department's functional requirements are 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, 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 requirements and the criteria set out in the project Terms of Reference.
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 the services that include but not be limited to the following activities:

1. Provide complete documentation on the operations and maintenance requirements;
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 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.
  - b. All test certificates, commissioning reports and commissioning documentation have been approved by the Departmental Representative.
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.
  - 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. CV 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.

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

#### **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.

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

## **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 a Call-Up.

\*Sub-Consultants and/or Specialists refers to Consultants outside of those included in the Consultant's Team Identification, attached at Appendix C, and as identified under TP 10.2. (d) Disbursements.

The Consultant Team may be requested to provide one or more of the following services, either independently or as part of the project for the specific project Call-up:

## **RS 2.2.1 INVESTIGATIONS AND REPORTS**

### **2.2.1.1 INTENT:**

The Consultant may be requested 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 required by the Department and shall include but not 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 Call-up, provide the following:

- a. Building Condition Report (BCR)
- b. Investment Analysis Report IAR)
- c. Building Assessment report
- d. Roof Investigation/Assessment report as required



---

## **RS 2.2.2 FUNCTIONAL PROGRAMMING**

### **2.2.2.1 INTENT:**

The purpose of a Functional Program is to ensure the Consultant has gathered sufficient information to analyse the Client Department's functional and operational requirements, developed an understanding of the requirements for the building's infrastructure and applied the GCworkplace Fit-Up Standards. At the time of call-up, 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 Client Department 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 Call-up:
  - 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
  - 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 call-up, provide the following:

#### **1. ADMINISTRATIVE SPACE RECOMMENDATIONS REPORT**

1. Gather and document the Client Department's administrative space requirements in a written and graphic format including but not limited to all workstation type and finishes.

2. Analyse information gathered and make recommendations in accordance with the GCworkplace 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 Department 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 Department'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. Analyse information gathered and make recommendations for support space in accordance with the GCworkplace 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 Department 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.
3. Submit for review. Revise as required. Resubmit for final approval.

## 3. SPECIAL PURPOSE SPACE RECOMMENDATIONS REPORT

1. Gather and document the Client Department'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. Analyse information gathered and make recommendations based on the GCworkplace Fit-Up Standards and the Client Department'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 Department;
  - 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 appropriate Client Department representative through the Departmental Representative.
4. A document indicating the effects of each of the proposed special purpose space planning alternatives, based on the Client Department mission statement, functional requirements, space allocation, and project budget. Provide written justification and rational for each of the planning alternatives.
5. Submit for review. Revise as required. Resubmit for final approval.

## 4. HIGHLY SPECIALIZED SPECIAL PURPOSE SPACES'

1. Provide the identified services described in the Required Services (RS) section of this document as they pertain to the fit-up of special purpose spaces that far exceed a standard fit-up in terms of the complexity of the technical and/or functional requirements involved.
2. Submit for review. Revise as required. Resubmit for final approval.

#### 5. 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. List by person, group, section, division etc.;
  - b. Open workstations;
  - c. Enclosed workstations;
  - 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 GCworkplace Fit-Up Standards, and the Space Allocation Limits of the Framework for Office Accommodation and Accommodation Services. 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 Call-Up.
4. Consultant to document all non-compliant items complete with justifications (provided by Client Department).
3. Identify, highlight and clarify all additional costs, which are outside the GCworkplace Fit-Up 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 Department'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 Department's 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 Department's current and future security requirements and the effect these may have on other functional requirements and proposed planning alternatives.

2. Coordinate with the Client Department'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 Department's current and future communications/data requirements and the effect these may have on other functional requirements and proposed planning alternatives. Report to be in accordance with the GCworkplace Fit-Up Standards.
2. Prepare recommendations and 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 Department'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. Analyse 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 rooms, training rooms or special purpose rooms requirements in accordance with the GCworkplace Fit-Up 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 Client Department's 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

1. Gather and document the Client Department's 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. Analyse information gathered and make recommendations for the development of workstations standards in accordance with the GCworkplace Fit-Up Standards and provide the following:
  - a. Recommendations based on the Client Department 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 Department;
  - c. A document indicating the effects of each of the proposed planning alternatives, based on the Client Department mission statement, functional requirements, space allocation, and project budget. Provide written justification and rationale for each of the planning alternatives.
  - d. A maximum of three (3) layouts for each category of workstation required;

- 
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, 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 screen, 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 Client Department's approved functional program, and vertical stacking. Number of plans, to be identified, at time of Call-up.
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 Client Department's approved functional program, proximity requirements, and space equation.
2. Number of diagrams, to be identified, at time of Call-up.
3. Submit for review. Revise as required. Resubmit for final approval.

## 16. ZONING (BUBBLE) DIAGRAM

1. Prepare zoning (bubble) diagrams based on the Client Department's 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 Call-up

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.

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 GCworkplace Fit-Up Standards, have been clearly identified.
4. Submit for review. Revise as required. Resubmit for final approval.

---

## **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. 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 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.

### **2.2.3.2 SCOPE AND ACTIVITIES:**

The Consultant shall provide:

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 Department's current and future security 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 Department'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 allocation on the Client Department 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 Department Fit-up Space requirements.
13. Functional Space Equation that addresses the space requirements in square meters (sm) 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 Client Departments approved functional program, proximity requirements and space equation.
16. horizontal zoning plans per floor that is based on Client Department's 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 Client Departments project requirements (number of options to be determined at time of Call-up);

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

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.



---

## **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 fit up standards are to be included in the scope of work. For standards relating to the required services described in this Standing Offer, refer to the "GCworkplace Fit-Up Standards" and the standards set out therein shall be adhered to. It is critical that all requirements that exceed or DO NOT form part of the "GCworkplace Fit-Up Standards" be clearly identified and highlighted. Document and assist in identifying all requirements that exceed or are NOT part of the standards. All non-compliant components must respect the Fit-up Standards Approval and Governance process. 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 substance 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 call-up. The number and frequency of project team meetings will be determined at time of Call-Up.
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.

### **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 call-up.

#### **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, electrical, structural, and communication/data elements on underside of suspended ceilings are correctly indicated.  
Submit for review. Revise as required. Resubmit for final approval.

2.

## 2. BUILDING CAPABILITY RECOMMENDATIONS REPORT

1. The intent of the Building Capability Report is to investigate, assess and analyse how well the building(s) meets Client Department requirements, and make recommendations to suit the Client Department'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.

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, communication/data, and security, to determine how effectively the building(s) meets Client Department requirements.

2. Prepare the Building Capability Report in reference to the Client Department'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 Department requirements;
  - d. Identification of all deficiencies, potentials and constraints with the existing building systems to support the Client Department'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;
  - 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 Government of Canada Workplace 2.0 Fit-Up 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 or LEED Commercial Interiors tool. 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. At the time of Call-up and based on GCworkplace Fit-Up Standards, prepare a maximum of two (2) schematic plans of one floor (or portion, depending on the size of the floor plate).
2. The schematic plans must reflect the approved Client Department'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 GCworkplace Fit-Up Standards, 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;
  - 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 (m²/\$) outlined in the GCworkplace Fit-Up Standards.
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 Department'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 Call-up.
3. Design Concept and alternative solutions must adhere to the Government of Canada Workplace 2.0 Fit-Up Standards.
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.
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 a project, where feasibility study services or deliverables are required above and beyond those described in RS 2.2.3 Feasibility Study.
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 of this Standing Offer 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) of Basic Services for list of services and deliverables.
2. Ensure Schematic plans prepared by others includes the deliverables described in RS 2.1.2 Design Concept (Schematic Design) of Basic Services, and that the deliverables are still current, i.e. up-to-date and are approved by the Client Department.
3. Provide a detailed list of all requirements that exceed the GCworkplace Fit-Up Standards. 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 one (1) 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.
2. Number of plans to be identified at time of Call-up.
3. Test plans must reflect Client's Department 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.

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 through Standing Offer or other government internal procurement methods 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.);
  - 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 through the Standing Offer process 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 Department. 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 (if applicable) and the Client Department.
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 Department in preparing a presentation to upper management of the Client Department, to achieve an executive level understanding of the project, to present progress status reports, obtain feedback, and/or seek approval.
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. EMPLOYEE INFORMATION SESSION

1. Assist the Departmental Representative or appropriate representative from the Client Department in the preparation of an information session for employees of the Client Department 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 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 Department, 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 Call-Up. 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.

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 Department costs (refer to the funding accountabilities identified in the GCworkplace Fit-Up Standards).
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 another Department for security systems, audio-visual equipment, telecommunication cabling, system furniture, high density mobile storage, etc.) with the scope of work within the project of the specific call-up.
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.



## **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 call-up. The number and frequency of project team meetings will be determined at the time of Call-Up;
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.

---

## **RS 2.2.6 SUSTAINABILITY STRATEGIES AND REPORTS**

### **2.2.6.1 INTENT:**

The Consultant, as strategic advisor for the project, is to research and investigate a wide range of sustainability strategies for the specific project with the objective to achieve the assessment tool targets that conform to PWGSC's diverse green building commitments as described in the Federal Sustainable Development Strategy (FSDS) including; but, not limited to:

1. Recycling and reuse of materials, systems, equipment;
2. Procurement of "green" materials;
3. Energy reduction and management;
4. Water management
5. Waste reduction and management;
6. Life-cycle costing, cost benefit analysis;
7. Integrated Design process.

### **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. Verify with Client Department. 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). Verify with Client Department. Revise as required. Obtain approval.
4. Investigate and analyze potential to exceeding the Model National Energy Code by 30% to 50%. Make recommendations for an Energy Reduction and Management plan.
5. Investigate and analyze potential to increasing energy efficiency, and strategies to decrease water run-offs.
6. Develop a non-hazardous and hazardous waste reduction and management plan. Make recommendations, verify with Client Department. Revise as required. Obtain approval.
7. Based on the recommendations included in 1 to 4, perform a cost / benefit and life-cycle costing analysis for the Sustainability Strategy 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:

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.
3. Establish a policy 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 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. LEED target (as per the Federal Sustainable Development Strategy (FSDS) at <http://www.ec.gc.ca/dd-sd/default.asp?lang=En&n=CD30F295-1> ) for the determined system scorecard indicating which credits the design does or will meet or equivalent, e.g. Green Globes.

**2.2.6.4 DELIVERABLES:**

The Consultant shall:

1. Submit the Sustainability Strategy for review, in a report.
2. Revise as required.
3. Resubmit for final approval.

---

## **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 stakeholder 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 is to ensure constant communication amongst the Departmental Representative, Consultant Team, Contractor, and the Provincial Department of Labour.

The Consultant Resident Site Representative 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. become 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. become 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.
3. Co-ordinate and direct an assistant 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, for the purpose of bringing to the attention of the Contractor, after checking with the Consultant, and Departmental Representative any discrepancies between the work, the contract documents and accepted construction procedures. He 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 Resident Site Representative shall make any other reports or surveys as may be requested by the Departmental Representative through the Consultant.

## **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 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 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 delegated by the Departmental Representative.

The Consultant may call upon the Resident Site Representative to assist in the evaluation of changes in the work, where a knowledge of job conditions is required.

## **5. Communication & Liaison**

The 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 of the work.
3. Communicate formally with the Contractor in writing, and immediately 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 will investigate, schedule and approve in writing, all temporary or permanent connections into any of the buildings' systems prior to the work being done. He 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 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;
- 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 PWGSC 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 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 for use by PWGSC, the consultant and himself at the site and ensure that permit documents are kept separately on site by the contractor but available for review by Departmental Representatives and AHJ's. Files include but are not limited to:

1. Contract and Tender Documents.
2. Approved Shop Drawings.
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 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 Resident Site Representative shall make on site observations and spot checks of the work to determine whether the work, materials and equipment conform with the contract documents and supplementary conditions. The Site consultant's 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 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 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 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 Resident Site Representative shall be responsible for the measurement of all work to be done on a unit-cost basis.

## **10. Site Meetings**

The Resident Site Representative shall attend all job-site meetings.

## **11. Inspection and Testing**

The Resident Site Representative must see that the tests and inspections required by the contract documents are conducted, and should observe these tests and report the results in the daily log. The Consultant should 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 Resident Site Representative shall give immediate written notice to the Contractor of the possible hazard. He shall further, if necessary, stop the work or give orders for remedial work, and contact the Consultant immediately for further instruction.

## **13. Limitations**

The 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 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 Resident Site representative's instructions and requirements and both parties will retain copies of the authority document signed mutually by them.

The 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 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 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.



---

## **RS 2.2.8 ESTIMATING AND COST PLANNING**

### **2.2.8.1 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 will 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 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 Milestones specified in this document, provide a complete 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 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.

A typical 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, 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:

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.

#### **(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 Consultant team shall fully advise the Departmental Representative.

The Cost Specialist with the Consultant team shall submit to PWGSC proposed alternative design solutions and revise the most recent monthly estimate.

An Exception Report will 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 Unifomat 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;

### (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 Consultant and either list them as assumptions, or have them incorporated in an outline specification modified by the Consultant.

## 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 Consultant of the cost information for alternative materials, methods and systems, it is necessary that the Cost 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 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 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**

Review, report on, and propose revisions to the existing class "D" estimate. Do not proceed until the Cost Specialist, the Consultant and PWGSC have 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 at the highest level of detail commensurate with the available information using elemental and additional detailed costs.

#### **Design Development**

Upon completion of design development 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.

Upon final acceptance, 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 using 100% measured quantities.

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, 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** 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.

#### **Post Contract**

The Cost Specialist may be required 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**

PWGSC 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.

## **RS 2.2.9 RISK MANAGEMENT**

### **2.2.9.1. INTENT:**

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 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.
- 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.

---

## **RS 2.2.10 CLOSURE REPORT**

If requested, the Consultant shall submit closure reports generally comprising of 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.

---

## **RS 2.2.11 AS BUILT DOCUMENTATION (DRAWINGS AND PHOTOGRAPHS) AND MEASURED DRAWINGS**

### **2.2.11.1 INTENT:**

1. The Consultant may be requested to 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 call-up.
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 the accuracy of the "as built" conditions during 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. Receive as-built drawings and measured drawings in AutoCAD format prepared by the contractor as per Doing Business with PWGSC.

### **2.2.11.3 DELIVERABLES:**

The Consultant shall provide:

1. As built drawings (received from the contractor)
2. Photographs



Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

## **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.

---

## **RS 2.2.13 COORDINATION OF OTHER SUB-CONSULTANTS AND SPECIALISTS**

### **2.2.13.1 INTENT:**

The Consultant shall coordinate and manage the services of additional sub-Consultants/Specialists\* required to complete project requirements in support of the requested services under a Call-Up.

\* Sub-Consultants and Specialists refers to consultants outside of those included in the Consultant's Team Identification, attached at Appendix C, and as identified under TP 10.2.(d) Disbursements.

### **2.2.13.2 SCOPE AND ACTIVITIES:**

The Consultant shall prepare a documentation and reporting structure for the coordination of the other sub-consultants and/or specialists 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 Consultant shall:

1. represent the client during the design and construction phase, leading up to the close-out of the project, including the completion and submission of the necessary warranty reviews. The Consultant shall also be involved in advising the client on dispute resolution with respect to construction quality, scheduling, progress payments and the submission of claims documents.

### **2.2.13.3 DELIVERABLES:**

The Consultant shall provide:

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 documents task/activities, milestones, process for information gathering, project goals and deliverables;
5. inspection and field reports to the authorities having jurisdiction.
6. minutes that 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;
7. status reports and distribute 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.

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

**RS 2.2.14      ADMINISTRATION OF MULTIPLE CONTRACTS**

The Consultant may be asked to coordinate the requirements of a project with the scope of multiple contracts managed by the Departmental Representative and/or the Client. The Consultant shall inform Departmental Representative and/or the Client of the discrepancies between the multiple contracts and the specific project. The Departmental Representative and/or the Client will determine which scope of work will be changed to rectify the conflict.

Details of required services to be determined at the time of each individual Call-up.

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

**RS 2.2.15 COMPLIANCE / TECHNICAL / PEER REVIEWS**

The Consultant may be asked to review the design of a project prepared by another consultant or to review a project built by a Contractor for compliance to specific standards. The Consultant and its sub-consultants / specialists will be advised of the applicable standards, building codes and regulations at the time of the Call-up. The Consultant and its 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 Call-up.

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

#### **RS 2.2.16 OTHER ADDITIONAL SERVICES**

If required, any additional services will be identified at the time of each individual Call-up, and the Consultant will be responsible for the provision and management of these additional services.

---

## **RS 2.3 SPECIALIZED SERVICES**

The Consultant shall coordinate and manage the 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 Call-Up.

\*Sub-Consultants and/or Specialists refers to Consultants outside of those included in the Consultant's Team Identification, attached at Appendix C, and as identified under TP 10.2. (d) Disbursements.

The consultant may be requested to provide one or more of the following specialized services, either independently or as part of the project for the specific project call-up.

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.

---

### **RS 2.3.1 HERITAGE CONSERVATION SPECIALIST**

If required, the Consultant will be responsible for the provision and management of a Heritage Conservation Specialist to provide the architectural conservation advice and services for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on the scope of services required to engage the Heritage Conservation Specialist to meet the project objectives.
2. Review and coordinate the Heritage Conservation Specialist's services required within the project parameters.
3. Coordinate with the Heritage Conservation Specialist 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.
4. 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 Specialist 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:**

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 to be determined at the time of each individual Call-up.



---

### **RS 2.3.2 LANDSCAPE ARCHITECTURAL DESIGN**

If required, Consultant will be responsible for the provision, management and coordination of a Landscape Architectural Professional to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on the requirements for the type of services required to engage the Landscape Architect to meet the project objectives;
2. Engage the Landscape Architect as a sub-consultant;
3. Review and coordinate the Landscape Architect's services required within the project parameters.

Details of required services to be determined at the time of each individual Call-up.

---

### **RS 2.3.3      GEOTECHNICAL ENGINEERING**

If required, Consultant will be responsible to advise the Departmental Representative of the scope of work for procuring geotechnical engineering services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on scope of services required for geotechnical engineering expertise;
2. Review and coordinate the Geotechnical Engineer's services required 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 to be determined at the time of each individual Call-up.

---

#### **RS 2.3.4 CIVIL ENGINEERING**

If required, Consultant will be responsible for the provision, management and coordination of a Civil Engineer to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on the requirements for the type of services required to engage the Civil Engineer to meet the project objectives;
2. Engage the Civil Engineering firm as a sub-consultant;
3. Review and coordinate the civil engineering services required 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 to be determined at the time of each individual Call-up.

---

### **RS 2.3.5 BUILDING ENVELOPE SPECIALIST**

If required, Consultant will be responsible for the management and coordination of a Building Envelope Specialist to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on scope of services required to engage the Building Science Specialist to meet the project objectives;
2. Review and coordinate the Building Science Specialist's services required 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:

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 PWGSC";
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 to be determined at the time of each individual Call-up.

---

### **RS 2.3.6 SUSTAINABLE DESIGN 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 required, Consultant will be responsible for the provision, management and coordination of a LEED accredited professional or equivalent to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on scope of services required to engage the Sustainable Design Specialist to meet the project objectives;
2. Review, integrate and coordinate the Sustainable Design Specialist's advice with the other disciplines and stakeholders to meet the requirements of the project.
3. The Consultant shall prepare sustainable design requirements for existing and proposed projects that meet LEED or Green Globes rating specified by the call-up. The Consultant shall use an integrated design approach and provide a list of areas and options to be selected to meet the sustainable rating determined by the Client Department for its buildings. Monitoring of the sustainable implementation strategy is to be provided by the Consultant;

The following are some examples of the scope of services where the sustainable design specialist would be required:

1. Provide sustainable design advisory services to the Consultant Team;
2. Direct and provide integrated design service for implementation of LEED or Green Globe or BOMA Best targets;
3. Prepare energy efficiency and renewable energy studies;
4. Prepare water efficiency studies;
5. Prepare environmentally preferable building materials and specifications;
6. Implement the recommendations of the sustainability report prepared by others into the design and contract documents;
7. Assess the degree of compliance of a project with established legal requirements and policies;
8. 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;
9. 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 BOMA Best.

Details of required services to be determined at the time of each individual Call-up.

---

**RS 2.3.7 INFORMATION TECHNOLOGY / TELECOMMUNICATION SPECIALIST**

If required, the Consultant will be responsible for the management and coordination of an Information Technology/Telecommunications Professional to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on the requirements for the type of services required to engage the Information Technology/Telecommunications Professional to meet the project objectives;
2. Review and coordinate the Information Technology/Telecommunications Services required 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 to be determined at the time of each individual Call-up.

---

### **RS 2.3.8 BUILDING CODE SPECIALIST**

If required, the Consultant will be responsible for the provision, management and coordination of a Building Code Specialist to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on the requirements for the type of services required to engage the Building Code Specialist to meet the project objectives;
2. Engage the Building Code Specialist firm as a sub-consultant;
3. Review and coordinate the Building Code Specialist services required 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 to be determined at the time of each individual Call-up.



---

**RS 2.3.9 AUDIO-VISUAL SPECIALIST**

If required, the Consultant will be responsible for the provision, management and coordination of an Audio-visual Specialist to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on the requirements for the type of services required to engage the Audio-visual Specialist to meet the project objectives;
2. Engage the Audio-visual Specialist firm as a sub-consultant;
3. Review and coordinate the Audio-visual Specialist services required within the project parameters.

The following are some examples of the type of services where the Audio-visual Specialist would be required:

1. Provide advice and specifications on type of audio-visual equipment required for training and/or meeting rooms for a specific project.
2. Prepare concept layouts for procurement of audio-visual equipment and special furniture related to audio-visual performance.
3. Prepare contract documents for procurement and installation of audio-visual equipment and special furniture related to audio-visual performance.

Details of required services to be determined at the time of each individual Call-up.

---

**RS 2.3.10 ACOUSTIC SPECIALIST SERVICES**

If required, Consultant will be responsible for the provision, management and coordination of an Acoustic Specialist to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on the requirements for the type of services required to engage the Acoustic Specialist to meet the project objectives;
2. Engage the Acoustic Specialist firm as a sub-consultant;
3. 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 to be determined at the time of each individual Call-up.

---

**RS 2.3.11 SECURITY SPECIALIST**

If required, Consultant will be responsible for the provision, management and coordination of a Security Specialist to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on the requirements for the type of services required to engage the Security Specialist to meet the project objectives;
2. Engage the Security Specialist firm as a sub-consultant;
3. Review and coordinate the Security Specialist services required 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 in an office, detention and/or institutional facilities or special purpose spaces.

Details of required services to be determined at the time of each individual Call-up.

---

**RS 2.3.12 SCHEDULING SPECIALIST**

If required, Consultant will be responsible for the provision, management and coordination of a Scheduling Specialist to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on the requirements for the type of services required to engage the Scheduling Specialist to meet the project objectives;
2. Engage the Scheduling Specialist firm as a sub-consultant;
3. 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 to be determined at the time of each individual Call-up.

---

**RS 2.3.13 FOOD SERVICE / KITCHEN CONSULTANT**

If required, Consultant will be responsible for the provision, management and coordination of a Food Service / Kitchen Consultant to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on the requirements for the type of services required to engage the Food Service / Kitchen Consultant to meet the project objectives;
2. Engage the Food Service / Kitchen Consultant firm as a sub-consultant;
3. Review and coordinate the Food Service / Kitchen Consultant services required 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 to be determined at the time of each individual Call-up.

---

**RS 2.3.14 VERTICAL TRANSPORTATION SPECIALIST**

If required, Consultant will be responsible for the provision, management and coordination of a vertical transportation specialist to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on the requirements for the type of services required to engage the vertical transportation specialist to meet the project objectives;
2. Engage the vertical transportation specialist firm as a sub-consultant;
3. Review and coordinate the vertical transportation specialist services required 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 to be determined at the time of each individual Call-up.

---

**RS 2.3.15 WAYFINDING AND SIGNAGE SPECIALIST**

If required, Consultant will be responsible for the provision, management and coordination of a wayfinding and signage specialist to provide the advice and services required for the specific project identified at the time of each individual Call-up.

The Consultant shall:

1. Provide advice on the requirements for the type of services required to engage wayfinding and signage specialist firm, who is familiar with the Federal Identity Program (FIP) standards, to meet project objectives;
2. Engage the wayfinding and signage specialist firm as a sub-consultant.
3. Review and coordinate the wayfinding and signage specialist services required 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 to be determined at the time of each individual Call-up.

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

### **RS 2.2.16 ROOFING SPECIALIST**

The Consultant may be asked to provide both project integrated and stand alone services in providing advice on proposed roof replacement, assessing existing roof conditions for repairs or replacement of roofs and providing related cost estimates.

Details of required services to be determined at the time of each individual Call-up.



## **RS 2.3.17      MASTER PLANNING SERVICES**

If required, the Consultant will be responsible for the provision, management and coordination of Master Planning services required for the specific project at the time of each individual Call-up.

The consultant shall perform services including but not limited to:

1. The evaluation of existing site planning, operations and maintenance processes, and subsequently, preparation of a report to document findings
2. The investigation and assessment of the design, serviceability and lifecycle of existing assets to identify opportunities, challenges, anticipated issues and;
3. The provision of options, in a specified format, for master planning solutions that respond to a given framework
4. Additional planning support as required.

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

**RS 2.3.18      OTHER SPECIALIZED SERVICES**

If required, any other specialized services will be identified at the time of each individual Call-up, and the Consultant will be responsible for the provision, management and coordination of these additional services.

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

### **SUBMISSION REQUIREMENTS AND EVALUATION (SRE)**

- SRE 1 General Information
- SRE 2 Proposal Requirements
- SRE 3 Submission Requirements and Evaluation
- SRE 4 Price of Services
- SRE 5 Total Score
- SRE 6 Submission Requirements - Checklist

---

## SUBMISSION REQUIREMENTS AND EVALUATION

### SRE 1 GENERAL INFORMATION

#### 1.1 Reference to the Selection Procedure

An 'overview of the selection procedure' can be found in General Instructions to Proponents (GI 9).

#### 1.2 Submission of Proposals

The Proponent is responsible for meeting all submission requirements. Please follow detailed instructions in "Submission of Proposals", General Instructions to Proponents (GI 10).

#### 1.3 Calculation of Total Score

For this Standing Offer the Total Score will be established as follows:

Technical Rating x 90%	=	Technical Score (Points)
<u>Price Rating x 10%</u>	=	<u>Price Score (Points)</u>
Total Score		Max. 100 Points

### SRE 2 PROPOSAL REQUIREMENTS

#### 2.1 Requirement for Proposal Format

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

1. Submit one (1) bound original plus trois (3) bound copies of the proposal
2. Paper size should be - 216mm x 279mm (8.5" x 11")
3. Minimum font size - 11 point Times or equal
4. Minimum margins - 12 mm left, right, top, and bottom
5. Double-sided submissions are preferred
6. One (1) 'page' means one side of a 216mm x 279mm (8.5" x 11") sheet of paper
7. 279mm x 432mm (11" x 17") fold-out sheets for spreadsheets, organization charts etc. will be counted as two pages.
8. The order of the proposals should follow the order of the Request for Standing Offer SRE 3 section.

#### 2.2 Specific Requirements for Proposal Format

The maximum number of pages (including text and graphics) to be submitted for the Rated Requirements under SRE 3.2 is fifty five (55) pages.

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

- Covering letter
- Table of Contents
- Tabs / Page Dividers (provided they are free of text and/or graphics)
- Declaration/Certifications Form (Appendix A)
- Integrity Provisions –Required Documentation
- Front page of the Request for Standing Offer document
- Front page of revision(s) to the Request for Standing Offer document
- Price Proposal Form (Appendix B)
- Team Identification (Appendix C)

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

---

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

### **3.1 MANDATORY REQUIREMENTS**

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

#### **3.1.1 Declaration/Certifications Form**

Proponents must complete, sign and submit the following:

- A. Appendix A, Declaration / Certifications Form as required.

#### **3.1.2 Licensing, Certification or Authorization**

The Proponent shall be authorized to provide Architectural services and must include an architect, a structural engineer, a mechanical engineer, an electrical engineer, an IT/ Telecommunications specialist, sustainable design specialist, functional programmer, an interior designer, a specification writer, a cost estimating specialist, a heritage conservation specialist, and a building envelope specialist, licensed, or eligible to be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial or territorial law in the province of Ontario.

You must indicate current license or how you intend to meet the provincial licensing requirements such that the project schedule is not adversely affected.

#### **3.1.3 Integrity Provisions – Required documentation**

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

#### **3.1.4 Consultant Team Identification**

The Consultant Team to be identified must include the following:

Proponent (Prime Consultant)	- Architect
Key Sub-consultants/Specialists	- Structural Engineer
	- Mechanical Engineer
	- Electrical Engineer
	- IT / Telecommunications Specialist
	- Sustainable Design Specialist
	- Functional Programmer
	- Interior Designer
	- Specification Writer
	- Cost Estimating Specialist
	- Heritage Conservation Specialist
	- Building Envelope Specialist

Information required - name of firm, key personnel to be assigned to the standing offer for its duration. For the prime and sub-consultant/specialist(s) indicate current professional license and/or how you intend to meet the Ontario provincial licensing requirements. In the case of a joint venture identify the existing or proposed legal form of the joint venture (refer to General Instructions - Limitation of Submissions).

The Consultant Team is to be identified in Appendix C - Team Identification.

---

## 3.2 RATED REQUIREMENTS

Proposals meeting the mandatory requirements will be evaluated in accordance with the following criteria. The clarity of the proposal writing will form part of the evaluation (use of language, document structure, conciseness and completeness of the response):

### 3.2.1 Comprehension of the Scope of Services

1. *What we are looking for:*  
A demonstration of the understanding of the overall requirements for services, including specific deliverables, expected approaches, technical expectations, and coordination requirements, especially in delivering government projects.
2. *What the Proponent should provide:*
  - a) scope of services - detailed list of services;
  - b) summary of your proposed typical work breakdown structure, i.e. resources assigned, time schedule, level of effort;
  - c) broader goals (federal image, sustainable development, sensitivities);
  - d) risk management strategy;
  - e) project management approach to working with PWGSC (understanding of PWGSC management structure, Client environment, standing offer process, working with the government in general).

### 3.2.2 Team Approach / Management of Services

1. *What we are looking for:*  
*How the team* will be organized in its approach and methodology in the delivery of the Required Services.
2. *What the Proponent should provide:*  
*A description of:*
  - a) Roles and responsibilities of key personnel;
  - b) Assignment of the resources and availability of back-up personnel;
  - c) Management and organization (reporting structure);
  - d) The firm's approach to responding to the individual call-ups which will arise as a result of this standing offer;
  - e) The design technologies which the firm will apply to develop design documents;
  - f) Quality control techniques and coordination of the design work between all required disciplines;
  - g) How the team intends to meet the 'Project Response Time Requirements';
  - h) Conflict resolution methods.

### 3.2.3 Past Experience

1. *What we are looking for:*  
Demonstration that over at least the past seven (7) years, the Proponent has participated in a range of projects requiring a full scope of services in accordance with the Required Services (RS) section. The Proponent's participation in these projects should have involved the scope of services listed in the Required Services (RS) section.
2. *What the Proponent should provide:*
  - a) A brief description of a maximum of five (5) significant projects completed over the last seven (7) years by the Proponent;

- 
- b) For the above projects, include the names of senior personnel and project personnel who were involved as part of the project team and their respective responsibilities, as well as the scope, and budget per discipline;
    - c) Indicate the dates the services were provided for the listed projects;
    - d) Scope of services rendered, project objectives, constraints and deliverables; and
    - e) Client references - name, address, phone and fax of client contact at working level. Reference checks may be completed if deemed necessary.
  3. The Proponent (as defined in General Instructions GI 1) must possess the knowledge on the above projects. Past project experience from entities other than the Proponent will not be considered in the evaluation unless these entities form part of a joint venture Proponent.
  4. Please indicate those projects which were carried out in joint venture and the responsibilities of each of the involved entities in each project.

### 3.2.4 Senior Personnel Expertise and Experience

1. *What we are looking for:*  
A demonstration that the Proponent has senior personnel with the capability, capacity and expertise in each area listed in the Required Services (RS) section.
2. *What the Proponent should provide:*
  - a) submit a maximum of two (2) c.v.'s of Prime Consultant senior personnel and one (1) c.v. of senior personnel for each sub-consultants/specialists of the Consultant Team. For each personnel, clearly indicate the past experience and specific roles and responsibilities related to the services specified in the Required Services (RS) section; Identify the personnel's years of experience, the number of years with the firm; and
  - b) professional accreditation; and
  - c) accomplishments/achievements/awards.

### 3.2.5 Project Personnel Expertise and Experience

1. *What we are looking for:*  
A demonstration that the Proponent has project personnel with the capability, capacity and expertise to provide the required services and deliverables listed in the Required Services (RS) section.
2. *What the Proponent should provide:*
  - a) submit a maximum of two (2) c.v.'s of prime Consultant project personnel and one (1) c.v.'s of project personnel for each sub-consultants/specialists of the Consultant Team which will perform the majority of the work resulting from the individual Call-ups. For each personnel, clearly indicate the past experience and specific roles and responsibilities related to the services specified in the Required Services (RS) section;
  - b) Identify the personnel's years of experience, the number of years with the firm;
  - c) professional accreditation; and
  - d) accomplishments/achievements/awards.

### 3.2.6 Hypothetical Projects

1. *What we are looking for:*

Describe the approach and methodology that you would employ to deliver the project in a general written response only.

The clarity of the report writing will form part of the evaluation (use of language, document structure, conciseness and completeness of the response).

2. *What the Proponent should provide for each hypothetical project :*
- description of the approach and methodology that you would employ to solve the problem;
  - summary of your proposed work breakdown structure, i.e. scope of work, resources assigned, time schedule, level of effort in terms of number of hours of all identified resources;
  - appropriateness of assigned resources;
  - level of effort;
  - project management approach to working with PWGSC (understanding of PWGSC management structure, CSU/Client environment, standing offer process, working with the government in general);
  - problem-solving methodology (client involvement, PWGSC involvement, other government agency involvement, creative approaches to solving problems).

Calculation of a fee for the provision of these services is not required.

3. *The Facts:*
- When responding to the following hypothetical fact situations, be advised that the hypothetical is to be used for evaluation purposes only. Areas and details in the hypothetical are provided only to give the Proponent sufficient material from which to develop an outline of their approach and methodology to the resolution of the issues.

## **PROJECT 1**

The Department of National Defence has issued a request to expand, upgrade and construct new facilities in an urban treed area. The base commander has indicated that he requires compliance to the most stringent code requirements in the National Building Code and the Ontario Building Code. The responsibility for the consultant engagement has been delegated to a commissioned officer who has been overseeing the warehousing of materials for the base, some of which materials are from time to time redistributed to or received from other bases in Canada.

The Base Commander's delegate has prepared a Client Accommodation Requirement Questionnaire, CARQ that lists requirements but requires consultant input for the best solution to meet current and future needs. What has been identified along with needed office space are storage needs for the following, with a note that most of the funding is for a consolidated building structure meeting an appropriate Sustainability rating:

- Ammunition
- Tires
- Mattresses
- Self-service storage building for personal effects of enlisted personnel and their families.

A site plan has been provided that shows the existing buildings, trees with diameters of 400mm and larger, and long fire route access that is 6M wide and courses between existing buildings.

### **Scope of Services required:**

Your firm has been asked to meet with the DND team to prepare the scope of work that will form the Terms of Reference to secure the end-state design of the project requirements.



After viewing the existing site plan, what would be the general information required that impacts the service proposal from the consultant?

Provide a list of questions for which you would require the DND project leader to furnish answers, whether from their own subject matter experts or from an accredited source.

## **PROJECT 2**

The Canadian Food Inspection Agency, CFIA, has issued a request for consultant services to renovate their facility that is located in a leased property of an industrial complex. The areas to be affected will be the laboratories for plant and animal samples, the office area with staff workstations, conference rooms, kitchenettes, lockers, quiet rooms, secured waiting area, washrooms and loading and receiving areas. The current leased area is approximately 1500 sm.

### **Scope of Services required:**

Consultant to review CARQ, Functional program and existing documents for the building to prepare Fees, Deliverables, Schedule, Construction Budget-Class D.

Please provide how you would satisfy the scope of work services and on what questions you would need clarification.

## **3.3 EVALUATION AND RATING**

Proposals that are responsive (i.e. which meet all the mandatory requirements set out in the Request for Standing Offer) will be reviewed, evaluated and rated by a PWGSC Evaluation Board. In the first instance, price envelopes will remain sealed and only the technical components of the proposal will be evaluated in accordance with the following to establish Technical Ratings:

Criterion	Weight Factor	Rating	Weighted Rating
Comprehension of the Scope of Services	1.0	0-10	0 - 10
Team Approach / Management of Services	1.5	0 - 10	0 - 15
Past Experience	1.5	0 - 10	0 - 15
Senior Personnel Expertise and Experience	1.5	0 - 10	0 - 15
Project Personnel Expertise and Experience	2.0	0 - 10	0 - 20
Hypothetical Project 1	1.5	0 - 10	0 - 15
Hypothetical Project 2	1.0	0 - 10	0 - 10
<b>Total</b>	<b>10.0</b>		<b>0 - 100</b>

### **Generic Evaluation Table**

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

	INADEQUATE	WEAK	ADEQUATE	FULLY SATISFACTORY	STRONG
0 point	2 points	4 points	6 points	8 points	10 points

Did not submit information which could be evaluated	Lacks complete or almost complete understanding of the requirements.	Has some understanding of the requirements but lacks adequate understanding in some areas of the requirements.	Demonstrates a good understanding of the requirements.	Demonstrates a very good understanding of the requirements.	Demonstrates an excellent understanding of the requirements.
	Weaknesses cannot be corrected	Generally doubtful that weaknesses can be corrected	Weaknesses can be corrected	No significant weaknesses	No apparent weaknesses
	Proponent do not possess qualifications and experience	Proponent lacks qualifications and experience	Proponent has an acceptable level of qualifications and experience	Proponent is qualified and experienced	Proponent is highly qualified and experienced
	Team proposed is not likely able to meet requirements	Team does not cover all components or overall experience is weak	Team covers most components and will likely meet requirements	Team covers all components - some members have worked successfully together	Strong team - has worked successfully together on comparable projects
	Sample projects not related to this requirement	Sample projects generally not related to this requirement	Sample projects generally related to this requirement	Sample projects directly related to this requirement	Leads in sample projects directly related to this requirement
	Extremely poor, insufficient to meet performance requirements	Little capability to meet performance requirements	Acceptable capability, should ensure adequate results	Satisfactory capability, should ensure effective results	Superior capability, should ensure very effective results

To be considered further, proponents **must** achieve a minimum weighted rating of fifty (50) out of the hundred (100) points available for the rated technical criteria as specified above.

**No further consideration will be given to proponents not achieving the pass mark of fifty (50) points.**

#### **SRE 4 PRICE OF SERVICES**

All price proposal envelopes corresponding to responsive proposals which have achieved the pass mark of fifty (50) points are opened upon completion of the technical evaluation. When there are three or more responsive proposals, an average price is determined by adding all the price proposals together and dividing the total by the number of price proposals being opened. This calculation will not be conducted when one or two responsive proposals are received.

All price proposals which are greater than 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 as follows:

1. The lowest price proposal receives a Price Rating of 100
2. The second, third, fourth and fifth lowest prices receive Price Ratings of 80, 60, 40, and 20 respectively. All other price proposals receive a Price Rating of 0.
3. On the rare occasions where two (or more) price proposals are identical, the matching price proposals receive the same rating and the corresponding number of following ratings are skipped.

The Price Rating is multiplied by the applicable percentage to establish the Price Score.

## SRE 5 TOTAL SCORE

Total Scores will be established in accordance with the following:

Rating	Possible Range	% of Total Score	Score (Points)
Technical Rating	0 - 100	90	0 - 90
Price Rating	0 - 100	10	0 - 10
<b>Total Score</b>		<b>100</b>	<b>0 - 100</b>

The proposals will be ranked in order from the highest to the lowest using the total score (technical plus price). The proponents submitting the highest ranked proposals will be recommended for issuance of a standing offer. In the case of a tie, the Proponent submitting the lower price for the services will be selected. Canada reserves the right to issue up to five (5) Standing Offers.

## SRE 6 SUBMISSION REQUIREMENTS - CHECKLIST

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

Please follow detailed instructions in "Submission of Proposals", General Instructions to Proponents (GI 10).

- ☐ Declaration / Certifications Form - completed and signed form provided in Appendix A
- ☐ Integrity Provisions – Required documentation – **as applicable**, in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per General instructions to Proponents (GI), Integrity Provisions – Proposal, **section 3a**.
- ☐ Integrity Provisions - Declaration of Convicted Offences – **with its bid, as applicable**, in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per General instructions to Proponents (GI), Integrity Provisions – Proposal, **section 3b**.
- ☐ Proposal - 1 original + 3 copies
- ☐ Front page of Request for Standing Offer
- ☐ Front page of Revision(s) to a Request for Standing Offer

In a separate envelope:

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

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

## **APPENDIX A**

### **Declaration/Certifications Form**

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

### Declaration / Certifications Form (page 1 of 5)

---

**Name of Proponent:**

**Street Address:**

**Mailing Address** (if different than street address)

**City:**

**City:**

**Prov./Terr./State:**

**Prov./Terr./State:**

**Postal/ZIP Code:**

**Postal/ZIP Code:**

**Telephone Number:**(    )

**Fax Number:**    (    )

**E-Mail:**

**Procurement Business Number:**

---

**Type of Organization**

**Size of Organization**

\_\_\_ Sole Proprietorship

Number of Employees \_\_\_\_\_

\_\_\_ Partnership

Graduate Architects/ \_\_\_\_\_

\_\_\_ Corporation

Prof. Engineers:  
Other Professionals \_\_\_\_\_

\_\_\_ Joint Venture

Technical Support \_\_\_\_\_

Other \_\_\_\_\_

---

---

**Declaration / Certifications Form (page 2 of 5)**

**Federal Contractors Program for Employment Equity - Certification**

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

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

Date: \_\_\_\_\_ (YY/MM/DD) (If left blank, the date will be deemed to be the RFSO closing date.)

Complete both A and B.

A. Check one of the following:

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

A5. The Proponent certifies having a combined workforce in Canada of 100 or more employees; and

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

**OR**

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

B. Check only one of the following:

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

**OR**

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

---

### Declaration / Certifications Form (page 3 of 5)

#### Former Public Servant (FPS) - Certification

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

#### Definitions

For the purposes of this clause,

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

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

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

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

#### Former Public Servant in Receipt of a Pension

As per the above definitions, is the Proponent a FPS in receipt of a pension? YES ( ) NO ( )

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

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

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

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

**Declaration / Certifications Form (page 4 of 5)**

**Work Force Adjustment Directive**

Is the Proponent a FPS who received a lump sum payment pursuant to the terms of a Work Force Adjustment Directive? YES ( ) NO ( )

If so, the Proponent must provide the following information:

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

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.



Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

### Declaration / Certifications Form (page 5 of 5)

---

**Name of Proponent:**

---

**This Declaration forms part of the offer.**

Education, Professional Accreditation and Experience:

All statements made with regard to the education, professional accreditation and the experience of individuals proposed for providing services under the Standing Offer are accurate and factual, and we are aware that Canada reserves the right to verify any information provided in this regard and that untrue statements may result in the proposal being declared non-responsive. Should a verification by Canada disclose untrue statements, Canada shall have the right to treat any standing offer resulting from this solicitation as being in default and to terminate it accordingly.

**DECLARATION:**

I, the undersigned, being a principal of the Proponent, hereby certify that the information given on this form and in the attached Proposal is accurate to the best of my knowledge.

**Name (print):** \_\_\_\_\_

**Capacity:** \_\_\_\_\_

**Signature** \_\_\_\_\_

**Telephone Number:** (    ) \_\_\_\_\_

**Fax Number:** (    ) \_\_\_\_\_

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

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

During proposal evaluation period, PWGSC contact will be with the above named person.

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

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

## **APPENDIX B**

### **Price Proposal Form**

---

## APPENDIX B - PRICE PROPOSAL

### INSTRUCTIONS

1. Complete price proposal form and submit in a separate sealed envelope, with the Proponent's name, Solicitation Number, and "Price Proposal Form" typed on the outside.
2. Price proposals are not to include Applicable Taxes and will be evaluated in Canadian Dollars.
3. Proponents are not to alter or add information to the form.
4. In order to ensure that fair and competitive hourly rates are received, the following requirements must be strictly adhered to: Proponents **must** provide an hourly rate for **each** category of personnel. In the event that the firm consists of fewer personnel than listed, provide an hourly rate that corresponds with each position listed. The hourly rate provided must be equal to or greater than the hourly rate provided for the position listed below it. For example, if the firm does not have an Intermediate Personnel, the hourly rate provided must be equal to or greater than the hourly rate provided for the Junior Personnel. **There must be no \$0 value nor NIL value. Failure to insert an hourly rate for each category of personnel will render your proposal non-responsive.**
5. One (1) price proposal evaluation grid is provided for each of the disciplines within each identified Region(s) under this RFSO. **Proponents must fill out (in its entirety) the price proposal grid(s) for each discipline(s) within each Region on which they intend to bid, even if the rates offered are the same for one, several or all Regions.** If a price proposal evaluation grid is not duly completed (column B) for any one of the identified disciplines, then the proponent's proposal for that Region will be considered non-responsive. In the case of arithmetic error in column C, the values in column B will prevail.
6. The hourly rates identified for all disciplines, including sub-consultants and specialists will be for the duration of the Standing Offer.
7. Fixed hourly rates for each category are to be provided in column B and are then multiplied by the weight factor in column A (provided for evaluation purpose only).

## CENTRAL ONTARIO

Name of Proponent: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

### 1. ARCHITECTURAL

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Architect	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

### 2. STRUCTURAL ENGINEER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Engineer	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

### 3. MECHANICAL ENGINEER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Engineer	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 4. ELECTRICAL ENGINEER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Engineer	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 5. IT/TELECOMMUNICATIONS

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 6. SUSTAINABLE DESIGN SPECIALIST

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 7. FUNCTIONAL PROGRAMMER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$

Administrative Support	5	\$	\$
<b>Total</b>	100		\$

**8. INTERIOR DESIGNER**

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

**9. SPECIFICATION WRITER**

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

**10. COST ESTIMATING SPECIALIST**

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

**11. HERITAGE CONSERVATION SPECIALIST**

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

## 12. BUILDING ENVELOPE SPECIALIST

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

## TOTAL FOR EVALUATION PURPOSES FOR CENTRAL ONTARIO

Discipline	Weight Factor (A)	Sub-Total from tables above (B)	Total (C) = (A X B)
Architectural	45	\$	\$
Structural Engineer	5	\$	\$
Mechanical Engineer	15	\$	\$
Electrical Engineer	15	\$	\$
IT/Telecommunications	2.5	\$	\$
Sustainable Design Specialist	2.5	\$	\$
Functional Programmer	2.5	\$	\$
Interior Designer	2.5	\$	\$
Specification Writer	2.5	\$	\$
Cost Estimating Specialist	2.5	\$	\$
Heritage Conservation Specialist	2.5	\$	\$
Building Envelope Specialist	2.5	\$	\$
<b>Total for all disciplines</b>	100		\$

## EASTERN ONTARIO

Name of Proponent: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

### 1. ARCHITECTURAL

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Architect	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

### 2. STRUCTURAL ENGINEER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Engineer	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

### 3. MECHANICAL ENGINEER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Engineer	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$



#### 4. ELECTRICAL ENGINEER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Engineer	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 5. IT/TELECOMMUNICATIONS

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 6. SUSTAINABLE DESIGN SPECIALIST

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 7. FUNCTIONAL PROGRAMMER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$

Administrative Support	5	\$	\$
<b>Total</b>	100		\$

**8. INTERIOR DESIGNER**

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

**9. SPECIFICATION WRITER**

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

**10. COST ESTIMATING SPECIALIST**

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

**11. HERITAGE CONSERVATION SPECIALIST**

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

## **12. BUILDING ENVELOPE SPECIALIST**

<b>Category of Personnel</b>	<b>Weight Factor (A)</b>	<b>Fixed Hourly Rate (B)</b>	<b>Total (C) = (A X B)</b>
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

## **TOTAL FOR EVALUATION PURPOSES FOR EASTERN ONTARIO**

<b>Discipline</b>	<b>Weight Factor (A)</b>	<b>Sub-Total from tables above (B)</b>	<b>Total (C) = (A X B)</b>
Architectural	45	\$	\$
Structural Engineer	5	\$	\$
Mechanical Engineer	15	\$	\$
Electrical Engineer	15	\$	\$
IT/Telecommunications	2.5	\$	\$
Sustainable Design Specialist	2.5	\$	\$
Functional Programmer	2.5	\$	\$
Interior Designer	2.5	\$	\$
Specification Writer	2.5	\$	\$
Cost Estimating Specialist	2.5	\$	\$
Heritage Conservation Specialist	2.5	\$	\$
Building Envelope Specialist	2.5	\$	\$
<b>Total for all disciplines</b>	100		\$

## SOUTH WESTERN ONTARIO

Name of Proponent: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

### 1. ARCHITECTURAL

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Architect	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

### 2. STRUCTURAL ENGINEER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Engineer	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

### 3. MECHANICAL ENGINEER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Engineer	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 4. ELECTRICAL ENGINEER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Engineer	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 5. IT/TELECOMMUNICATIONS

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 6. SUSTAINABLE DESIGN SPECIALIST

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 7. FUNCTIONAL PROGRAMMER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$

Administrative Support	5	\$	\$
<b>Total</b>	100		\$

**8. INTERIOR DESIGNER**

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

**9. SPECIFICATION WRITER**

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

**10. COST ESTIMATING SPECIALIST**

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

**11. HERITAGE CONSERVATION SPECIALIST**

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

## 12. BUILDING ENVELOPE SPECIALIST

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

## TOTAL FOR EVALUATION PURPOSES FOR SOUTH WESTERN ONTARIO

Discipline	Weight Factor (A)	Sub-Total from tables above (B)	Total (C) = (A X B)
Architectural	45	\$	\$
Structural Engineer	5	\$	\$
Mechanical Engineer	15	\$	\$
Electrical Engineer	15	\$	\$
IT/Telecommunications	2.5	\$	\$
Sustainable Design Specialist	2.5	\$	\$
Functional Programmer	2.5	\$	\$
Interior Designer	2.5	\$	\$
Specification Writer	2.5	\$	\$
Cost Estimating Specialist	2.5	\$	\$
Heritage Conservation Specialist	2.5	\$	\$
Building Envelope Specialist	2.5	\$	\$
<b>Total for all disciplines</b>	100		\$

## NORTHERN ONTARIO

Name of Proponent: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

### 1. ARCHITECTURAL

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Architect	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

### 2. STRUCTURAL ENGINEER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Engineer	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

### 3. MECHANICAL ENGINEER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Engineer	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$



#### 4. ELECTRICAL ENGINEER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Engineer	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 5. IT/TELECOMMUNICATIONS

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 6. SUSTAINABLE DESIGN SPECIALIST

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 7. FUNCTIONAL PROGRAMMER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 8. INTERIOR DESIGNER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 9. SPECIFICATION WRITER

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 10. COST ESTIMATING SPECIALIST

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

#### 11. HERITAGE CONSERVATION SPECIALIST

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

## 12. BUILDING ENVELOPE SPECIALIST

Category of Personnel	Weight Factor (A)	Fixed Hourly Rate (B)	Total (C) = (A X B)
Partners or principals of the firm	5	\$	\$
Senior Personnel	25	\$	\$
Intermediate Personnel	40	\$	\$
Junior Personnel	25	\$	\$
Administrative Support	5	\$	\$
<b>Total</b>	100		\$

## TOTAL FOR EVALUATION PURPOSES FOR NORTHERN ONTARIO

Discipline	Weight Factor (A)	Sub-Total from tables above (B)	Total (C) = (A X B)
Architectural	45	\$	\$
Structural Engineer	5	\$	\$
Mechanical Engineer	15	\$	\$
Electrical Engineer	15	\$	\$
IT/Telecommunications	2.5	\$	\$
Sustainable Design Specialist	2.5	\$	\$
Functional Programmer	2.5	\$	\$
Interior Designer	2.5	\$	\$
Specification Writer	2.5	\$	\$
Cost Estimating Specialist	2.5	\$	\$
Heritage Conservation Specialist	2.5	\$	\$
Building Envelope Specialist	2.5	\$	\$
<b>Total for all disciplines</b>	100		\$

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

**Signature of Consultant or Joint Venture Consultants.**

.....  
signature signature

.....  
capacity capacity

.....  
signature signature

.....  
capacity capacity

**END OF PRICE PROPOSAL FORM**

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

## **APPENDIX C**

### **TEAM IDENTIFICATION**

## **TEAM IDENTIFICATION**

1. Complete the Consultant Team Identification in the format provided below, including the following information for each identified team member of the Consultant Team; Name, Category Personnel and Provincial Professional Licensing Status.
2. Provide short C.V.s for each identified team member. C.V's should have sufficient detail to explain experience in the respective discipline(s).
3. C.V's provided under Appendix C - Team Identification, will not form part of the evaluation or page limitation identified under the SRE 3.2 Rated Requirements section, and are to appear under the Appendix C section only.

Please note, the SRE 3.2 Rated Requirements section has a separate requirement which includes the provision of C.V's for evaluation purposes (SRE 3.2.4 and 3.2.5).

### **I. Prime Consultant (Proponent): Architect**

**Firm:**

Name .....

**Key Individuals:**

1. Name .....
2. Category of Personnel (i.e. Principal, Senior, Intermediate) .....
3. Provincial professional licensing status. ....  
.....  
.....

### **II. A. Key Sub Consultants/Specialist: Structural Engineer**

**Firm:**

Name .....

**Key Individuals:**

1. Name .....
2. Category of Personnel (i.e. Principal, Senior, Intermediate) .....
3. Provincial professional licensing status. ....  
.....  
.....

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

### **B. Key Sub Consultants/Specialist: Mechanical Engineer**

**Firm:**

Name .....

**Key Individuals:**

1. Name .....
2. Category of Personnel (i.e. Principal, Senior, Intermediate) .....
3. Provincial professional licensing status. ....  
.....  
.....

### **C. Key Sub Consultants/Specialist: Electrical Engineer**

**Firm:**

Name .....

**Key Individuals:**

1. Name .....
2. Category of Personnel (i.e. Principal, Senior, Intermediate) .....
3. Provincial professional licensing status. ....  
.....  
.....

### **D. Key Sub Consultants/Specialist: IT/Telecommunications Engineer**

**Firm:**

Name .....

**Key Individuals:**

1. Name .....
2. Category of Personnel (i.e. Principal, Senior, Intermediate) .....
3. Provincial professional licensing status. ....  
.....  
.....

### **E. Key Sub Consultants/Specialist: Sustainable Design Specialist**

**Firm:**

Name .....

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

**Key Individuals:**

1. Name .....
2. Category of Personnel (i.e. ....  
Principal, Senior, Intermediate) .....
3. Provincial professional  
licensing status. ....  
.....  
.....

**F. Key Sub Consultants/Specialist: Functional Programmer**

**Firm:**

Name .....

**Key Individuals:**

1. Name .....
2. Category of Personnel (i.e. ....  
Principal, Senior, Intermediate) .....
3. Provincial professional  
licensing status. ....  
.....  
.....

**G. Key Sub Consultants/Specialist: Interior Designer**

**Firm:**

Name .....

**Key Individuals:**

1. Name .....
2. Category of Personnel (i.e. ....  
Principal, Senior, Intermediate) .....
3. Provincial professional  
licensing status. ....  
.....  
.....

**H. Key Sub Consultants/Specialist: Specification Writer**

**Firm:**

Name .....

**Key Individuals:**

1. Name .....
2. Category of Personnel (i.e. ....  
Principal, Senior, Intermediate) .....
3. Provincial professional  
licensing status. ....  
.....  
.....



Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

.....  
.....

#### **I. Key Sub Consultants/Specialist: Cost Estimating Specialist**

**Firm:**

Name .....

**Key Individuals:**

1. Name .....
2. Category of Personnel (i.e. Principal, Senior, Intermediate) .....
3. Provincial professional licensing status. ....  
.....  
.....

#### **J. Key Sub Consultants/Specialist: Heritage Conservation Specialist**

**Firm:**

Name .....

**Key Individuals:**

1. Name .....
2. Category of Personnel (i.e. Principal, Senior, Intermediate) .....
3. Provincial professional licensing status. ....  
.....  
.....

#### **K. Key Sub Consultants/Specialist: Building Envelope Specialist**

**Firm:**

Name .....

**Key Individuals:**

1. Name .....
2. Category of Personnel (i.e. Principal, Senior, Intermediate) .....
3. Provincial professional licensing status. ....  
.....  
.....

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

## **APPENDIX D**

### **DOING BUSINESS WITH PWGSC**

**(see attached)**

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

## **APPENDIX E**

### **PERFORMANCE EVALUATION**

#### **CONSULTANT PERFORMANCE EVALUATION REPORT FORM (CPERF)**

**(see attached)**

Solicitation No. - N° de l'invitation  
EQ754-193417/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
PWL035

Client Ref. No. - N° de réf. du client  
EQ754-193417

File No. - N° du dossier  
PWL-8-41133

CCC No./N° CCC - FMS No./N° VME

---

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

---

## APPENDIX F

### ONTARIO REGION -

### GEOGRAPHIC BOUNDARIES BY COUNTY

#### Central

Dufferin  
Durham  
Haliburton  
Kawartha Lakes  
Muskoka  
Nippising  
Northumberland  
Parry Sound  
Peel  
Peterborough  
Simcoe  
Toronto  
Victoria  
York

#### Eastern

Frontenac  
Hastings  
Lanark  
Leeds and Grenville  
Lennox and Addington  
Prescott Edward  
Stormont Dundas and  
Glengarry  
Renfrew  
Prince Edward  
Russell

#### South Western

Brant  
Bruce  
Elgin  
Essex  
Grey  
Haldimand  
Halton  
Waterloo  
Wellington  
Hamilton  
Wentworth  
Huron  
Kent  
Lambton  
Middlesex  
Niagara  
Oxford  
Perth  
Manitoulin

#### Northern

Algoma  
Cochrane  
Kenora, East of 9 0°  
longitude, ETZ  
Sudbury  
Thunder bay  
Timiskaming  
Rainy River  
Kenora, West of 9 0°  
longitude, CTZ

CTZ = Central Time  
Zone  
ETZ = Eastern Time  
Zone

Excludes the municipality of Ottawa-Carleton



Serving  
**GOVERNMENT,**  
Serving  
**CANADIANS.**

## 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, 2018

## **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 1<sup>st</sup> 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 1<sup>st</sup> 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 2<sup>nd</sup> 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 3<sup>rd</sup> 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 3<sup>rd</sup> 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 3<sup>rd</sup> tier folder in each document.

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

The 4<sup>th</sup>-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



**SELECT - CONSULTANT PERFORMANCE EVALUATION REPORT FORM (CPEF)**  
**SELECT - FORMULAIRE DU RAPPORT D'ÉVALUATION DU RENDEMENT DE L'EXPERT-CONSEIL (FREREC)**

Contract Number - N° du contrat	Project Number - N° du projet	Client Reference Number - N° de référence du client
---------------------------------	-------------------------------	---

Description of work - Description des travaux

Firm's Name - Nom de l'entreprise

Firm's Address - Adresse de l'entreprise

Project Manager - Gestionnaire de projet		Contract Information - Information sur le contrat	
Name - Nom		Contract Award Amount Montant du marché adjugé	Contract Award Date Date de l'adjudication du marché
Telephone No. - N° de téléphone	Fax No. - N° de télécopieur	Final Amount - Montant Final	Contract Completion Date Date d'achèvement du contrat
Cell No. - N° de cellulaire			
E-Mail Address - Adresse électronique		No. of Amendments - Nombre de modifications	

DESIGN - CONCEPTION	Category - Catégorie	Scale Échelle	Points Pointage
This is the rating of the quality of the design. Voici l'évaluation de la qualité de la conception.	Unacceptable - Inacceptable	0 - 5	<input type="text"/> <input type="checkbox"/> N/A S/O
	Not Satisfactory - Non satisfaisant	6 - 10	
	Satisfactory - Satisfaisant	11 - 16	
	Superior - Supérieur	17 - 20	
QUALITY OF RESULTS - QUALITÉ DES RÉSULTATS			
This is the rating of the quality of not only the final deliverable but also the deliverables throughout the various stages of the project. Voici l'évaluation de la qualité du produit final, mais aussi des produits à livrer aux diverses étapes du projet.	Unacceptable - Inacceptable	0 - 5	<input type="text"/> <input type="checkbox"/> N/A S/O
	Not Satisfactory - Non satisfaisant	6 - 10	
	Satisfactory - Satisfaisant	11 - 16	
	Superior - Supérieur	17 - 20	
MANAGEMENT - GESTION			
This is the rating of how the project was managed including the project delivery, and overall consultant services. Voici l'évaluation de la façon dont le projet a été géré, y compris l'exécution du projet et la prestation de l'ensemble des services d'expert-conseil.	Unacceptable - Inacceptable	0 - 5	<input type="text"/> <input type="checkbox"/> N/A S/O
	Not Satisfactory - Non satisfaisant	6 - 10	
	Satisfactory - Satisfaisant	11 - 16	
	Superior - Supérieur	17 - 20	
TIME - DÉLAIS			
This is the rating of time planning and schedule control. Voici l'évaluation de la planification du temps et du contrôle du calendrier.	Unacceptable - Inacceptable	0 - 5	<input type="text"/> <input type="checkbox"/> N/A S/O
	Late - En retard	6 - 10	
	On time - À temps	11 - 16	
	Ahead of Schedule - En avance sur le calendrier	17 - 20	
COST - COÛT			
This is the rating of the quality of cost planning and control during the life of the project. Voici l'évaluation de la qualité de la planification et du contrôle des coûts pendant la durée du projet.	Unacceptable - Inacceptable	0 - 5	<input type="text"/> <input type="checkbox"/> N/A S/O
	Not Satisfactory - Non satisfaisant	6 - 10	
	Satisfactory - Satisfaisant	11 - 16	
	Superior - Supérieur	17 - 20	
<b>Total points Total du pointage</b>			<b>0 / 100</b>

Comments - Commentaires

PWGSC TPSGC	Name - Nom	Title - Titre	Signature	Date
----------------	------------	---------------	-----------	------

**INSTRUCTIONS AND ADDITIONAL INFORMATION (SELECT - Consultant Performance Evaluation Report)**  
**INSTRUCTIONS ET RENSEIGNEMENTS SUPPLÉMENTAIRES (SELECT - Rapport d'évaluation du rendement de l'expert-conseil)**

**DESIGN - CONCEPTION**

The following items should be considered:

- Understanding of the project objectives and constraints
- Thoroughness of and logical approach in problem analysis and exploration of alternatives
- Appropriateness of concept and sensitivity to context (physical and non-physical, image, site, geography, function, client, etc.)
- Functional/technical requirements: effectiveness of concept in providing for functional and technical requirements, including flexibility and expansion
- Aesthetic/spatial qualities and/or engineering "elegance"
- Functional performance for users: efficiency, safety, comfort and convenience, ease of operation and maintenance including engineering and architectural support elements/services
- Building science and engineering technology: equipment and construction systems, materials selections and detailing conducive to efficient construction and good life-cycle performance/economics; judgment in balancing between use of new technology vs. reliance on proven technology

Il faut tenir compte des éléments suivants :

- Compréhension des objectifs et des contraintes du projet
- Rigueur de l'analyse des problèmes et de l'approche logique utilisée et recherche de solutions de rechange
- Pertinence du concept et sensibilité au contexte (physique et non physique, image, site, géographie, fonction, client, etc.)
- Exigences fonctionnelles et techniques : efficacité du concept pour répondre aux exigences fonctionnelles et techniques, y compris la souplesse et l'expansion
- Qualités relatives à l'esthétique et à l'espace et/ou «élégance» technique
- Rendement fonctionnel pour les utilisateurs : efficacité, sécurité, confort, commodité, facilité de fonctionnement et d'entretien, y compris les éléments ou services de soutien à l'architecture et au génie
- Science du bâtiment et techniques de l'ingénieur : équipement et procédés de construction, sélection et description des matériaux favorisant la construction efficace et un bon rapport rendement/prix pendant la durée de vie; jugement pour équilibrer l'utilisation de nouvelles technologies et de technologies éprouvées

**QUALITY OF RESULTS - QUALITÉS DES RÉSULTATS**

The following items should be considered:

- Responsiveness to PWGSC/Client input
- Coverage of all aspects of process (all technical issues addressed, approval authorities, departmental procedures, etc.)
- Quality of studies including: comprehensive investigation work, logical analysis, firm and substantiated recommendations, clarity of presentation
- Quality of working documents (completeness, accuracy, co-ordination)
- Quality control on construction
- Contract administration - correctness, timeliness

Il faut tenir compte des éléments suivants :

- Réceptivité aux suggestions de TPSGC et du client
- Traitement de tous les aspects du processus (toutes les questions techniques, les pouvoirs d'approbation, les procédures ministérielles, etc.)
- Qualité des études, y compris : examen complet des travaux à effectuer, analyse logique, recommandations fermes et justifiées, clarté de la présentation
- Qualité des documents de travail (complets, exacts et coordonnés)
- Contrôle de la qualité relative à la construction
- Administration du contrat - exactitude, rapidité

**MANAGEMENT - GESTION**

The extent to which the firm takes charge of and effectively manages the work has a direct effect on the inputs required of PWGSC. Consideration should be given to:

- Delivery of a comprehensive, reliable and effective service in a responsive, orderly and "surprise free" manner
- Appropriate understanding of the Consultant role, within the context of PWGSC's operating environment and objectives and of the needs of the project
- Application of initiative, judgement and attentiveness in providing services
- Management of Consultant team: leadership, efficiency, fairness, and ensuring proper level of service
- Co-ordination of sub-consultants, if applicable
- Sensitivity of external factors: awareness of current conditions in the building industry and in the local community, and use of this information for the benefit of the project

La mesure dans laquelle l'entrepreneur assume efficacement la gestion des travaux a une incidence directe sur les services qu'on attend de TPSGC. Il faut tenir compte des éléments suivants :

- Prestation d'un service complet, fiable et efficace de façon souple, ordonnée et «sans surprise»
- Bonne compréhension du rôle de l'expert-conseil dans le contexte de l'environnement opérationnel de TPSGC et compte tenu des objectifs et des impératifs du projet
- Initiative, jugement et attention dans la fourniture des services
- Gestion de l'équipe d'experts-conseils : leadership, efficacité, équité et prestation d'un niveau de service adéquat
- Coordination du travail des sous-expert-conseil, s'il y a lieu
- Sensibilité aux facteurs externes : connaissance des conditions actuelles dans l'industrie du bâtiment et dans la collectivité locale et utilisation de cette connaissance dans l'intérêt du projet

**TIME - DÉLAIS**

For the purpose of evaluating the firm's time performance, consideration must be given to conditions beyond the firm's control including PWGSC / Contractor / Client Performance. The Project Manager is to consider whether the following was provided:

- Timely and accurate progress reporting
- On-schedule delivery of services in every stage

En ce qui a trait à l'évaluation du respect des délais par l'entreprise, il faut tenir compte des conditions indépendantes de la volonté de celle-ci, y compris du rendement de TPSGC, de l'entrepreneur et du client. Le gestionnaire de projet doit évaluer si les éléments suivants ont été fournis :

- Présentation de rapports d'avancement précis dans les délais prescrits
- Prestation des services dans les délais requis à toutes les étapes

**COST - COÛT**

The following items should be considered:

- Management of the design development within cost plan
- Timeliness of estimating and cost plan monitoring
- Final project estimate vs. Actual (established at award)
- Application of value engineering to design decisions, if applicable
- Appropriate balance of cost between estimate elements

Il faut tenir compte des éléments suivants :

- Gestion de l'élaboration de la conception dans le cadre du plan financier
- Rapidité de l'estimation et surveillance du respect du plan financier
- Estimation finale par rapport à l'estimation actuelle (faite au moment de l'attribution du contrat)
- Application de l'ingénierie de la valeur aux décisions de conception, s'il y a lieu
- Bon équilibre des coûts entre les éléments de l'estimation