



**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 PROPOSAL  
DEMANDE DE PROPOSITION**

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

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

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

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

**Comments - Commentaires**

Address Enquiries to:  
E-mail: Lauren.Woodhall@pwgsc.gc.ca

<b>Title - Sujet</b> LSNMCA Multiuse Building	
<b>Solicitation No. - N° de l'invitation</b> 5P201-180231/A	<b>Date</b> 2019-05-07
<b>Client Reference No. - N° de référence du client</b> 5P201-180231	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$PWL-035-2454	
<b>File No. - N° de dossier</b> PWL-8-41121 (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 2019-06-19</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> 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> Parks Canada Nipigon, ON Canada POT 2JO	

Instructions: See Herein

Instructions: Voir aux présentes

**Vendor/Firm Name and Address**

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

**Issuing Office - Bureau de distribution**

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

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

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

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PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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**THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT**

**REQUEST FOR PROPOSAL (RFP)**

**Lake Superior National Marine  
Conservation Area  
Discovery Centre and  
Multiuse Building**

Solicitation No. 5P201-180231/A

PWGSC Contracting Authority:

Lauren Woodhall  
PWGSC, Real Property Contracting  
4900 Yonge St.  
Toronto, Ontario M2N 6A6  
Cell No.: 416-230-9083  
Email: [lauren.woodhall@pwgsc-tpsgc.gc.ca](mailto:lauren.woodhall@pwgsc-tpsgc.gc.ca)

## TABLE OF CONTENTS

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

Front Page

Supplementary Instructions to Proponents (SI)

- SI1 Introduction
- SI2 Proposal Documents
- SI3 Questions or request for clarifications
- SI4 Canada's Trade Agreements
- SI5 Certifications
- SI6 Security Requirement
- SI7 Web Sites

Terms, Conditions and Clauses

Agreement

Supplementary Conditions (SC)

- SC1 Security Requirement
- SC2 Federal Contractors Program for Employment Equity - Default by the Consultant

Agreement Particulars

Submission Requirements and Evaluation (SRE)

Terms of Reference (Appendix A-A)

Team Identification Format (Appendix A)

Declaration/Certifications Form (Appendix B)

Price Proposal Form (Appendix C)

Doing Business with PWGSC Documentation and Deliverables Manual (Appendix D)

Security Requirements Check List (Appendix E)

Existing Documentaion (Appendix F)

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## SUPPLEMENTARY INSTRUCTIONS TO PROPONENTS (SI)

### SI1 INTRODUCTION

1. Public Works and Government Services Canada (PWGSC) intends to retain an individual consulting firm or joint venture to provide the professional services for the project as set out in this Request for Proposal (RFP).
2. Because of the considerable time and expense involved in the preparation, submission and evaluation of full proposals, proponents responding to this RFP are requested to submit a proposal in two phases. Phase One proposals cover only the qualifications, experience and organization of the proposed Consultant Team. Following evaluation and rating of these proposals, proponents are advised of their competitive standing and have the opportunity to decide whether or not to continue their participation by submitting a Phase Two proposal. Phase Two proposals cover the detailed approach to the work, and the pricing and terms offered. A combination of the Phase One and Phase Two submissions constitutes the final proposal.
3. Initially, firms are invited to submit a proposal in the first phase of the selection procedure outlined below. Only the Phase One information asked for in the RFP is to be included in the Phase One proposal, and evaluation and rating of Phase One proposals will be carried out only on the Phase One information requested.  
**IN PHASE ONE, NO MATERIAL IS TO BE SUBMITTED ON THE SUBJECT PROJECT ITSELF.**

## SI2 PROPOSAL DOCUMENTS

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

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

2. The following are the proposal documents:

- (a) Supplementary Instructions to Proponents (SI);  
R1110T (2017-08-17), General Instructions (GI) – Architectural and/or Engineering Services – Two Phase Request for Proposal;  
Submission Requirements and Evaluation (SRE);

Subsection 2.b. of section GI16, Submission of proposal of R1110T, incorporated by reference above, is deleted in its entirety and replaced with the following:

- b. send its proposal only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit specified on page 1 of the RFP;
- (b) the general terms, conditions and clauses, as amended, identified in the Agreement clause;
- (c) Project Brief / Terms of Reference;
- (d) the document entitled "Doing Business with PWGSC Documentation and Deliverables Manual";
- (e) the **Security Requirements Check List (SRCL)**;
- (f) any amendment to the solicitation document issued prior to the date set for receipt of Phase Two proposals;
- (g) the proposal submitted at Phase One and Declaration/Certifications Form;  
and
- (h) the proposal submitted at Phase Two and Price Proposal Form.

3. Submission of a proposal constitutes acknowledgment that the Proponent has read and agrees to be bound by these documents.

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

Questions or requests for clarification during the Phase One solicitation period must be submitted in writing to the Contracting Authority named on the RFP - Page 1 at e-mail address [lauren.woodhall@pwgsc.gc.ca](mailto:lauren.woodhall@pwgsc.gc.ca) as early as possible. Enquiries should be received no later than 10 working days prior to the closing date identified on the front page of the Request for Proposal. Enquiries received after that date may not be answered prior to the closing date of the solicitation.

### **SI4 CANADA'S TRADE AGREEMENTS**

This procurement is subject to the provisions of the North American Free Trade Agreement (NAFTA), the World Trade Organization - Agreement on Government Procurement (WTO-AGP), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).

### **SI5 CERTIFICATIONS**

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

In accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Proponent must **provide with its bid, as applicable**, to be given further consideration in the procurement process, the required documentation as per R1110T (2017-08-17), General instructions 1 (GI1), Integrity Provisions – Proposal, **section 3b**.

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

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

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

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

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

## **SI6 SECURITY REQUIREMENT**

1. At the date of bid closing, the following conditions must be met:
  - (a) the Proponent must hold a valid organization security clearance as indicated in Supplementary Conditions SC1;

## **SI7 WEBSITES**

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

Employment Equity Act

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

Federal Contractors Program (FCP)

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

Certificate of Commitment to Implement Employment Equity form LAB 1168

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

Ineligibility and Suspension Policy

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

Code of Conduct for Procurement

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

Lobbying Act

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

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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## Buy and Sell

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

## Supplier Registration Information

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

## Consultant Performance Evaluation Report Form

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

## Canadian economic sanctions

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

## National Joint Council (NJC) Travel Directive

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

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## TERMS, CONDITIONS AND CLAUSES

### AGREEMENT

1. The Consultant understands and agrees that upon acceptance of the offer by Canada, a binding Agreement shall be formed between Canada and the Consultant and the documents forming the Agreement shall be the following:
  - (a) the Front Page and this Agreement clause;
  - (b) the General Terms, Conditions and Clauses, as amended, identified as:
    - R1210D (2018-06-21), General Condition (GC) 1 - General Provisions – Architectural and/or Engineering Services
    - R1215D (2016-01-28), General Condition (GC) 2 - Administration of the Contract – Architectural and/or Engineering Services
    - R1220D (2015-02-25), General Condition (GC) 3 - Consultant Services
    - R1225D (2015-04-01), General Condition (GC) 4 - Intellectual Property
    - R1230D (2018-06-21), General Condition (GC) 5 - Terms of Payment – Architectural and/or Engineering Services
    - R1235D (2011-05-16), General Condition (GC) 6 - Changes
    - R1240D (2018-06-21), General Condition (GC) 7 - Taking the Services Out of the Consultant's Hands, Suspension or Termination
    - R1245D (2016-01-28), General Condition (GC) 8 - Dispute Resolution – Architectural and/or Engineering Services
    - R1250D (2017-11-28), General Condition (GC) 9 - Indemnification and Insurance
  - (c) Supplementary Conditions
  - (d) Agreement Particulars
  - (e) Project Brief / Terms of Reference;
  - (f) the document entitled "Doing Business with PWGSC Documentation and Deliverables Manual";
  - (g) the Security Requirements Check List (SRCL);
  - (h) any amendment to the solicitation document incorporated in the Agreement before the date of the Agreement;
  - (i) the Phase One proposal and Declaration/Certifications Form;
  - (j) the Phase Two proposal and Price Proposal Form.
2. The documents identified above by title, number and date are hereby incorporated by reference into and form part of this Agreement, as though expressly set out herein, subject to any other express terms and conditions herein contained.

The documents identified above by title, number and date are set out in the Standard Acquisition Clauses and Conditions (SACC) Manual, issued by Public Works and Government Services Canada (PWGSC). The SACC Manual is

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available on the PWGSC Web site: <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>

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

## **SUPPLEMENTARY CONDITIONS (SC)**

### **SC1 SECURITY REQUIREMENT**

1. The following security requirement (SRCL and related clauses) applies and form part of the Agreement.

#### **SECURITY REQUIREMENT FOR CANADIAN SUPPLIER: PWGSC FILE N° 5P201-180231 / A**

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC.
3. The Contractor/Offeror MUST NOT remove any PROTECTED information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.

4. Subcontracts, which contain security requirements, are NOT to be awarded without the prior written permission of CISD/PWGSC.
5. The Contractor/Offeror must comply with the provisions of the:
  - a) Security Requirements Check List and Security Guide (if applicable), attached at Annex E;
  - b) *Industrial Security Manual* (Latest Edition).

## **SC2 FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - DEFAULT BY THE CONSULTANT**

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

### **AGREEMENT PARTICULARS**

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

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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## **SUBMISSION REQUIREMENTS AND EVALUATION**

SRE 1 General Information

SRE 2 Proposal Requirements

SRE 3 Phase One Submission Requirements and Evaluation

SRE 4 Phase Two Submission Requirements and Evaluation

SRE 5 Price of Services

SRE 6 Total Score

SRE 7 Submission Requirements - Checklist

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## 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 R1110T General Instructions to Proponents (GI3).

#### 1.2 Calculation of Total Score

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

Phase One Rating x 30%	=	Phase One Score (Points)
Phase Two Technical Rating x 60%	=	Technical Score (Points)
<u>Phase Two 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 (for phases one and two)

The following proposal format information should be implemented when preparing the Phase One and Phase Two proposals.

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

## **2.2 Phase One Specific Requirements for Proposal Format**

The maximum number of pages (including text and graphics) to be submitted for the Rated Requirements under SRE 3.2 is twenty (20) pages.

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

- Covering letter
- Consultant Team Identification (Appendix A)
- Declaration/Certifications Form (Appendix B)
- Integrity Provisions – Required Documentation

***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.***

## **2.3 Phase Two Specific Requirements for Proposal Format**

The maximum number of pages (including text and graphics) to be submitted for the Rated Requirements under SRE 4.2 is thirty (30) pages.

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

- Covering letter
- Consultant Team Verification
- Front page of the RFP
- Front page of revision(s) to the RFP
- Price Proposal Form (Appendix C)

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

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

*Intent: The intent of Phase One evaluation activities is to verify that the submissions meet the mandatory screening requirements and to evaluate and rate the proposed teams.*

#### **3.1 MANDATORY REQUIREMENTS**

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

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

The proponent shall be an Architect, 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.

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

The consultant team to be identified at Phase One must include the following:

Proponent (prime consultant) –

- Architect
- Passive House Designer
- Envelope Specialist

Key Sub-consultants / Specialists –

- Civil Engineer
- Geotechnical Engineer
- Structural Engineer
- Mechanical Engineer
- Electrical Engineer
- Code Specialist
- Landscape architect
- Cost Consultant
- Passive House Certifier
- Environmental Engineer
- Quantity Surveyor

If the proponent proposes to provide multidisciplinary services that might normally be provided by a sub-consultant, this should be indicated here.

Information required - name of firm, key personnel to be assigned to the project. For the prime consultant indicate current license and/or how you intend to meet the provincial or territorial licensing requirements. In the case of a joint venture identify the existing or proposed legal form of the joint venture (refer to R1110T General Instructions to Proponents, GI9 Limitation of Submissions).

Proponents will be required to carry over the consultant team identified in Phase One to Phase Two.

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

### 3.1.3 Declaration/Certifications Form

Proponents must complete, sign and submit the following:

- Appendix B, Declaration/Certifications Form as required

### 3.1.4 Integrity Provisions – Required documentation

In accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Proponent must provide, **as applicable**, to be given further consideration in the procurement process, the required documentation as per R1110T (2017-08-17), General instructions 1 (GI1), Integrity Provisions – Proposal, **section 3a**.

## 3.2 RATED REQUIREMENTS

The evaluation criteria for the Phase One proposal addresses only the previous achievements and experiences of the proposed Consultant Team. No material is to be prepared or presented on the subject project itself. The Phase One proposal provides the opportunity for proponents to present their past work in the context of the proposed project. It is at this time that interested firms submit to PWGSC a history of their accomplishments in order to establish the capabilities of their teams and lead designers as well as other key team members.

### 3.2.1 Achievements of Proponent on Projects

Describe the Proponent's accomplishments, achievements and experience as prime consultant on projects.

Select a **maximum** of 2 projects undertaken within the last 10 years. Joint venture submissions are not to exceed the maximum number of projects. Only the first 2

projects listed in sequence will receive consideration and any others will receive none as though not included.

Information that should be supplied:

- clearly indicate how this project is comparable/relevant to the requested project.
- brief project description and intent. Narratives should include a discussion of design philosophy / approach to meet the intent, design challenges and resolutions.
- budget control and management - i.e. contract price & final construction cost - explain variation
- project schedule control and management - i.e. initial schedule and revised schedule - explain variation
- client references - name, address, phone and fax of client contact at working level - references may be checked
- names of key personnel responsible for project delivery
- awards received

The Proponent (as defined in R1110T General Instructions to Proponents, GI2 Definitions) 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.

Please indicate those projects which were carried out in joint venture and the responsibilities of each of the involved entities in each project.

### **3.2.2 Achievements of Key Sub-consultants and Specialists on Projects**

Describe the accomplishments, achievements and experience either as prime consultant or in a sub-consultant capacity on projects. If the Proponent proposes to provide multi-disciplinary services which might otherwise be performed by a sub-consultant, this should be reflected here.

Select a **maximum** of 2 projects undertaken within the last 10 years per key sub consultant or specialist. Only the first 2 projects listed in sequence (per key subconsultant or specialist) will receive consideration and any others will receive none as though not included.

Information that should be supplied:

- clearly indicate how this project is comparable/relevant to the requested project.
- brief project description and intent. Narratives should include a discussion of design philosophy / approach to meet the intent, design challenges and resolutions.
- budget control and management
- project schedule control and management

- client references - name, address, phone and fax of client contact at working level - references may be checked
- names of key personnel responsible for project delivery
- awards received

### **3.2.3 Achievements of Key Personnel on Projects**

Describe the experience and performance of key personnel to be assigned to this project regardless of their past association with the current proponent firm. This is the opportunity to emphasize the strengths of the individuals on the team, to recognize their past responsibilities, commitments and achievements.

#### Information that should be supplied for each key personnel:

- professional accreditation
- accomplishments/achievements/awards
- relevant experience, expertise, number of years experience
- role, responsibility and degree of involvement of individual in past projects

### 3.3 EVALUATION AND RATING

Past experience of the Proponent and the consultant team will be evaluated at the Phase One submission stage and the scores for this evaluation will be carried over to the Phase Two submission.

Phase One proposals which are responsive will be reviewed, evaluated and rated by a PWGSC Evaluation Board in accordance with the following:

Criterion	Weight Factor	Rating	Weighted Rating
Achievements of Proponent	4.0	0 - 10	0 - 40
Achievements of Key Sub-consultants / Specialists	3.0	0 - 10	0 - 30
Achievements of Key Personnel on Projects	3.0	0 - 10	0 - 30
Phase One Rating			0 - 100

The Phase One rating which is assigned to each responsive proposal in accordance with the procedure outlined in the General Instructions to Proponents is the total weighted rating assigned to the Phase One proposal in accordance with the above table. The Phase One rating is recorded for subsequent inclusion as a percentage of the total score to be established following the evaluation and rating of Phase Two proposals.

#### 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

---

## **SRE 4 PHASE TWO SUBMISSION REQUIREMENTS AND EVALUATION**

*Intent: The intent of Phase Two evaluation activity is to verify that the submissions meet the mandatory screening requirements, to evaluate and rate the proposals and to recommend contract award to the Proponent with the highest total score.*

### **4.1 MANDATORY REQUIREMENTS**

Only those submissions from proponents that have met the following requirements will be evaluated and rated by a PWGSC Evaluation Board:

4.1.1 Having submitted a responsive Phase One proposal

4.1.2 Consultant Team Verification submittal of a statement indicating the Consultant Team identified in Phase One is being carried over to Phase Two.

### **4.2 RATED REQUIREMENTS**

*Intent: The evaluation criteria for the Phase Two proposal addresses the Consultant Team's "understanding of the project" i.e. technical, schedule and estimate requirements, "scope of services" "management of services" and "design philosophy/approach" based on the requirements described in the Project Brief. Past achievements and experience of the Proponent and Key Sub-Consultants are evaluated in Phase One and will not be re-evaluated in Phase Two. The Phase Two Proposal gives the proponents the opportunity to describe what they intend to offer PWGSC in terms of their understanding of the project, scope of services and management of the project.*

The following requirements will be evaluated and rated by a PWGSC Evaluation Board. The price proposal of each Proponent may or may not be opened.

#### **4.2.1 Understanding of the Project:**

The proponent should demonstrate understanding of the goals of the project, the functional/technical requirements, the constraints and the issues that will shape the end product.

Information that should be supplied:

- The functional and technical requirements
- Broader goals (federal image, sustainable development, accessibility, indigenous sensitivities, understanding of the local cultural and geographical context)
- The relationship between this commission and any earlier studies completed for PWGSC

- Significant issues, challenges and constraints
- Project schedule and cost. Review schedule and cost information and assess risk management elements that may affect the project
- The Client User's philosophies and values
- The importance of integrating visitor experience interpretive elements into all aspects of exterior design, and where appropriate the interior design
- The relationship between this commission and any earlier studies completed

#### **4.2.2 Scope of Services:**

The proponent should demonstrate capability to perform the services and meet project challenges and to provide a plan of action.

##### Information that should be supplied:

- Scope of Services - detailed list of services
- Work Plan - detailed breakdown of work tasks and deliverables
- Project schedule - proposed major milestone schedule
- Risk management strategy

#### **4.2.3 Management of Services:**

The Proponent should describe how he /she proposes to perform the services and meet the constraints; how the services will be managed to ensure continuing and consistent control as well as production and communication efficiency; how the team will be organized and how it will fit in the existing structure of the firms; to describe how the team will be managed. The proponent is also to identify sub-consultant disciplines and specialists required to complete the consultant team.

If the Proponent proposes to provide multi-disciplinary services which might otherwise be performed by a sub-consultant, this should be reflected here.

##### Information that should be supplied:

- Confirm the makeup of the full project team including the names of the consultant sub-consultants and specialists personnel and their role on the project.
- Organization chart with position titles and names (Consultant team). Joint Venture business plan, team structure and responsibilities, if applicable
- What back-up will be committed
- Profiles of the key positions (specific assignments and responsibilities)
- Outline of an action plan of the services with implementation strategies and sequence of main activities

- Reporting relationships
- Communication strategies
- Response time: demonstrate how the response time requirements will be met

#### 4.2.4 Design Philosophy / Approach / Methodology

The proponent should elaborate on aspects of the project considered to be a major challenge which will illustrate design philosophy / approach / methodology. This is the opportunity for the Proponent to state the overall design philosophy of the team as well as their approach of resolving design issues and in particular to focus on the unique aspects of the current project.

Information that should be supplied:

- Design Philosophy / Approach / Methodology
- Describe the major challenges and how your team approach will be applied to those particular challenges.

### 4.3 EVALUATION AND RATING

#### 4.3.1 Technical Rating

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

Criterion	Weight Factor	Rating	Weighted Rating
Understanding of the Project - technical, schedule & cost	3.0	0 - 10	0 - 30
Scope of Services	2.0	0 - 10	0 - 20
Management of Services	3.0	0 - 10	0 - 30
Design Philosophy/Approach/Methodology	2.0	0 - 10	0 - 20
Phase Two Technical Rating			0 - 100

#### 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 found in the above section 3.3 Evaluation and Rating.

### 4.3.2 Combined Technical Rating

The Phase One Rating and Phase Two Technical Rating will be combined to establish a Combined Technical Score:

Combined Rating	Possible Range	% of Total Score	Score (Points)
Phase One Rating	0 - 100	30	0 - 30
Phase Two Technical Rating	0 - 100	60	0 - 60
Combined Technical Score		90	0 - 90

To be considered further, proponents **must** achieve a minimum Combined Technical Score of forty-five (45) points out of the ninety (90) points available as specified above.

**No further consideration will be given to proponents not achieving the pass mark of forty-five (45) points.**

### SRE 5 PRICE OF SERVICES

All price proposal envelopes corresponding to responsive proposals which have achieved the pass mark of forty-five (45) points will be 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:

- A. The lowest price proposal receives a Price Rating of 100
- B. 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.
- C. 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.

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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## SRE 6 TOTAL SCORE

Total Scores will be established in accordance with the following:

<b>Rating</b>	<b>Possible Range</b>	<b>% of Total Score</b>	<b>Score (Points)</b>
Phase One Rating	0 - 100	30	0 - 30
Phase Two Technical Rating	0 - 100	60	0 - 60
Price Rating	0 - 100	10	0 - 10
<b>Total Score</b>		<b>100</b>	<b>0 - 100</b>

The Proponent receiving the highest Total Score is the first entity that the Evaluation Board will recommend for the provision of the required services. In the case of a tie, the proponent submitting the lower price for the services will be selected.

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## SRE 7 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 R1110T General instructions to proponents, G116 Submission of proposal, as amended in SI2 Proposal documents. Proponents may choose to introduce their submissions with a cover letter.

### PHASE ONE:

- Team Identification - see typical format in Appendix A
- Declaration/Certifications Form - completed and signed - form provided in Appendix B
- Proposal - one (1) original plus five (5) copies
- Integrity Provisions – Required documentation – **as applicable** in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per R1110T (2017-08-17), General instructions 1 (G11), 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 R1110T (2017-08-17), General instructions 1 (G11), Integrity Provisions – Proposal, **section 3b**.

### PHASE TWO:

- Verification of Team - confirmed Phase One team identification information
- Proposal - one (1) original plus five (5) copies
- Front page of RFP
- Front page(s) of any solicitation amendment

### In a separate envelope:

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

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

---

**Appendix A-A**  
**Terms of Reference**  
**(see attached)**

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

---

## **Appendix A**

### **Team Identification Format**

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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## APPENDIX A - TEAM IDENTIFICATION FORMAT

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

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

### I. Prime Consultant (Proponent):

#### Architect

Firm or Joint Venture Name: .....

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

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#### Passive House Designer

Firm Name: .....

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

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#### Envelope Specialist

Firm Name: .....

.....

.....

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

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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**II. Key Sub Consultants / Specialists:**

**Civil Engineer**

Firm Name: .....  
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Key Individuals and provincial professional licensing status and/or professional accreditation:

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**Geotechnical Engineer**

Firm Name: .....  
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Key Individuals and provincial professional licensing status and/or professional accreditation:

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**Structural Engineer**

Firm Name: .....  
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Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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

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**Mechanical Engineer**

Firm Name: .....  
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Key Individuals and provincial professional licensing status and/or professional accreditation:

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**Electrical Engineer**

Firm Name: .....  
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Key Individuals and provincial professional licensing status and/or professional accreditation:

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**Code Specialist**

Firm Name: .....  
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Key Individuals and provincial professional licensing status and/or professional accreditation:

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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**Landscape Architect**

Firm Name: .....  
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Key Individuals and provincial professional licensing status and/or professional accreditation:

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**Cost Consultant**

Firm Name: .....  
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Key Individuals and provincial professional licensing status and/or professional accreditation:

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**Passive House Certifier**

Firm Name: .....  
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Key Individuals and provincial professional licensing status and/or professional accreditation:

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Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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**Environmental Engineer**

Firm Name: .....  
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Key Individuals and provincial professional licensing status and/or professional accreditation:

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**Quantity Surveyor**

Firm Name: .....  
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Key Individuals and provincial professional licensing status and/or professional accreditation:

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Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

---

## **Appendix B**

### **Declaration/Certifications Form**

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

---

## APPENDIX B - DECLARATION/CERTIFICATIONS FORM

**Project Title:**

**Name of Proponent:**

**Street Address:**

**Mailing Address:**

**Telephone Number:** (    )

**Fax Number:** (    )

**E-Mail:**

**Procurement Business Number:**

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

---

## APPENDIX B - DECLARATION/CERTIFICATIONS FORM (CONT'D)

### Federal Contractors Program for Employment Equity - Certification

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

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

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

Complete both A and B.

A. Check only one of the following:

- A1. The Proponent certifies having no work force in Canada.
- A2. The Proponent certifies being a public sector employer.
- A3. The Proponent certifies being a federally regulated employer being subject to the *Employment Equity Act*.
- A4. The Proponent certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.
- A5. The Proponent has a combined work force in Canada of 100 or more employees;  
and

## **APPENDIX B - DECLARATION/CERTIFICATIONS FORM (CONT'D)**

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

**OR**

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

B. Check only one of the following:

- B1. The Proponent is not a Joint Venture.

**OR**

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

---

## APPENDIX B - DECLARATION/CERTIFICATIONS FORM (CONT'D)

### Former Public Servant (FPS) - Certification

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

### Definitions

For the purposes of this clause,

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

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

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

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

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## APPENDIX B - DECLARATION/CERTIFICATIONS FORM (CONT'D)

### Former Public Servant in Receipt of a Pension

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

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

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

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

### Work Force Adjustment Directive

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

If so, the Proponent must provide the following information:

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

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

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

---

## APPENDIX B - DECLARATION/CERTIFICATIONS FORM (CONT'D)

**Name of Proponent:**

**DECLARATION:**

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

..... name	..... signature
..... title	
I have authority to bind the Corporation / Partnership / Sole Proprietorship / Joint Venture	
..... name	..... signature
..... title	
I have authority to bind the Corporation / Partnership / Sole Proprietorship / Joint Venture	
..... name	..... signature
..... title	
I have authority to bind the Corporation / Partnership / Sole Proprietorship / Joint Venture	

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

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

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

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

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

---

## **Appendix C**

### **Price Proposal Form**

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

**APPENDIX C - PRICE PROPOSAL FORM**

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

PROponents SHALL NOT ALTER THIS FORM

**Project Title:** Lake Superior National Marine Conservation Area Multi-use Building

**Name of Proponent:**

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

**REQUIRED SERVICES**

**Fixed Fee** (R1230D (2018-06-21), GC 5 - Terms of Payment – Architectural and/or Engineering Services)

SERVICES	FIXED FEE
RS 3.2 Project Planning services	\$.....
RS 3.3 Pre-Design Services	\$.....
RS 3.4 Schematic Design Services	\$.....
RS 3.5 Design Development Services	\$.....
RS 3.6 Construction Documents	\$.....
RS 3.7 Tendering Services	\$.....
RS 3.8 Construction/Supervision	\$.....
RS 3.9 Post Construction Services	\$.....
RS 3.10 Project administration	\$.....

**MAXIMUM FIXED FEES** \$.....

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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**APPENDIX C - PRICE PROPOSAL FORM (CONT'D)**

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**TOTAL COST OF SERVICES FOR PROPOSAL EVALUATION PURPOSES**

Total Fee for Required Services \$.....

Total Evaluated Fee \$.....

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Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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## **APPENDIX C - PRICE PROPOSAL FORM (CONT'D)**

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### **The following will NOT form part of the evaluation process**

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Canada may accept or reject any of the following fees, disbursements and/or hourly rates. Canada reserves the right to negotiate on these fees, disbursements and/or hourly rates.





Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

---

## **Appendix D**

### **Doing Business with PWGSC Documentation and Deliverables Manual (see attached)**

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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**Appendix E**  
**Security Requirements Check List**  
**(see attached)**

Solicitation No. - N° de l'invitation  
5P201-180231/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
pwl035

Client Ref. No. - N° de réf. du client  
5P201-180231

File No. - N° du dossier  
PWL-8-41121

CCC No./N° CCC - FMS No./N° VME

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## **Appendix F**

**Existing Documentation  
(see attached)**

# Term of Reference for Consulting Services



## Lake Superior National Marine Conservation Area Discovery Centre and Multiuse building

Parks Canada,  
Northern Ontario Field Unit  
LS NMCA 001

# TABLE OF CONTENTS

## Contents

<b>1.</b>	<b>PROJECT INFORMATION .....</b>	<b>3</b>
1.1.	PROJECT IDENTIFICATION .....	3
1.1.1.	Stakeholders .....	3
1.1.2.	Project Contacts.....	3
1.2.	CONTEXT OF THIS PROJECT IN THE NATIONAL MARINE CONSERVATION AREA .....	4
1.3.	PROJECT .....	4
1.4.	PROJECT OBJECTIVES, METHODOLOGY AND GUIDING PRINCIPLES .....	5
1.4.1.	General: .....	5
1.4.2.	Project delivery approach:.....	5
1.4.3.	Official languages: .....	6
1.5.	PROJECT SCOPE OF WORK .....	6
1.5.1.	New construction of a Multiuse Building:.....	6
1.6.	SITE DESCRIPTION AND SITE REQUIRED SERVICES.....	7
1.6.1.	Site description .....	7
1.6.2.	Environmental Assessment.....	8
1.6.3.	Land Survey .....	9
1.6.4.	Geotechnical Report.....	9
<b>2.</b>	<b>PROJECT PARAMETERS .....</b>	<b>9</b>
2.1.	BUDGET.....	9
2.2.	SCHEDULE .....	9
2.2.1.	Project milestones.....	9
2.2.2.	Occupant considerations.....	11
2.2.3.	Items that could Impact Project Completion Schedule .....	11
2.3.	EXISTING DOCUMENTATION .....	11
2.3.1.	The following is a list of documents available for your reference (Attached in One drive): .....	11
<b>3.</b>	<b>REQUIRED SERVICES .....</b>	<b>12</b>
3.1.	GENERAL .....	12
3.2.	PROJECT PLANNING SERVICES .....	14
3.3.	PRE-DESIGN SERVICES .....	15
3.4.	SCHEMATIC DESIGN SERVICES .....	18
3.5.	DESIGN DEVELOPMENT SERVICES .....	22
3.6.	CONSTRUCTION DOCUMENT SERVICES .....	26
3.7.	TENDERING SERVICES.....	29
3.8.	CONSTRUCTION ADMINISTRATION SERVICES .....	30
3.9.	POST CONSTRUCTION SERVICES .....	37
3.10.	PROJECT ADMINISTRATION .....	38
<b>4.</b>	<b>PCA INTERNAL PROCESS .....</b>	<b>41</b>
4.1.	FEDERAL PROJECT TEAM PARTICIPANTS .....	41
<b>5.</b>	<b>HEALTH AND SAFETY .....</b>	<b>41</b>
	SITE ACCESS.....	43

# **1. PROJECT INFORMATION**

## **1.1. PROJECT IDENTIFICATION**

PROJECT TITLE	Lake Superior National Marine Conservation Area
LOCATION OF PROJECT	Nipigon, ON, Canada, P0T 2J0
PROJECT NUMBER	LS NMCA-001

### **1.1.1. Stakeholders**

CLIENT DEPARTMENT / USER:	Cory Gaudet Northern Ontario Field Unit, Parks Canada Agency
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### **1.1.2. Project Contacts**

PCA PROJECT MANAGER	Maguy Eustache, Project Architect 30 Victoria Street, Gatineau, QC Phone: 819-420-9615 Email: Maguy.Eustache@pc.gc.ca
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## **1.2. CONTEXT OF THIS PROJECT IN THE NATIONAL MARINE CONSERVATION AREA**

Lake Superior is the largest lake in the world. The Lake Superior National Marine Conservation Area (NMCA) covers a total area of 10,880 square meters of water and several hundred of small islands stretching between the tip of Thunder Cape and Bottle Point east of Terra Bay and extending south to the border marking the portion of Lake Superior within the jurisdiction of the USA. Along the North shore of Lake Superior the landscape consists of rolling hills, imposing cliff faces, forests, rivers and magnificent views of the lake. This area and the communities along the shore showcase life on the edge of an inland sea.

The Parks Canada Administration and Discovery Centre Building (Referred to as the Discovery Centre) to be located on the waterfront of Nipigon, Ontario will house the administrative and operational staff for this NMCA. This building is intended to represent the hub of Parks Canada's presence in the region and staff at the facility will include Resource Conservation specialists, Law Enforcement and Visitor Experience team members. The building must be able to accommodate the current staff and be able to handle possible growth in the future, and have room for some storage and maintenance materials. The intent for the design is to provide an extremely sustainable building which exemplifies the Agency's focus on sustainable use, while still meeting operational requirements. The final concept must include a building which houses the administrative functions while also presenting a unique piece of architecture which is visitor friendly for the discovery centre portion of the structure.

The exterior of this building and the landscaping of the site around it, should complement the existing landscape and fully incorporate a sense of arrival for visitors and staff as they arrive at the location.

## **1.3. PROJECT**

Located in a vacant lot in township of Nipigon, a small township located 120 km northeast of Thunder Bay, Ontario, the project is a new multi-use building housing a discovery centre, administration offices, maintenance garage, a parking lot, site work for the outdoor portion of the interpretive exhibit and arrival sequence, and outside storage on the selected location in the town of Nipigon.

Parks Canada Agency (PCA) requires a full range of professional services including, but not limited to: investigation, planning, design, construction administration and post-construction professional services and to coordinate interpretive and exhibit design services that will be managed directly by PCA with another consulting firm specialized in this field of expertise.

The intent is for the building to be maintained by an external contractor, not internal Parks Canada maintenance personnel.

## 1.4. PROJECT OBJECTIVES, METHODOLOGY AND GUIDING PRINCIPLES

### 1.4.1. General:

- a) Deliver the project to meet PCA needs, respecting the approved scope, quality, budget and schedule;
- b) All decisions that impact scope, quality, cost and schedule must be discussed with the Project Manager;
- c) Provide rigorous quality assurance reviews during the design and construction administration stages, including the application of value architecture/engineering reviews in the design.
- d) Respond rapidly to correct issues and address requests for clarifications.
- e) Ensure continuity of key personnel working in a dedicated effort for the project life;
- f) Meet productivity, health, wellness and sustainability principles in accordance with Treasury Board Secretariat Real Property guidelines. <http://www.tbs-sct.gc.ca/pol/doc-fra.aspx?id=12042>;
- g) Use integrated design processes with all disciplines through all stages of the project;
- h) Complete a design which fully integrates visitor experience, branding, and interpretive experience elements. These must be part of the design at every stage, not an afterthought or add on;
- i) Embrace sustainable building principles in an integrated and holistic manner;
- j) Integrate energy and resource conservation technologies into the design. Technology shall not be an after-thought employed to correct fundamental design deficiencies;
- k) Achieve energy conservation through passive solar design and the passive house methodology;
- l) Use sustainable materials with the least environmental impact based on embodied energy, embodied water, embodied emissions and recycled content. Use locally sourced material if possible. Material selection must meet the responsible industry living building imperative and avoid materials identified on the living building red list. Full list available at this link <https://living-future.org/declare/declare-about/red-list/>.
- m) Wood first (FSC): Wood shall be considered as the preferred construction material wherever economically competitive.
- n) Dark sky protection is a priority at Parks Canada Agency. Parks Canada guidelines and specifications for outdoor lighting must be followed.

### 1.4.2. Project delivery approach:

- a) Traditional Design-Bid-Build approach.
- b) PCA will tender Contracts through PSPC contracting authorities. Tenders will be managed through PSPC and PCA.

- c) Project will be managed by PCA.

#### **1.4.3. Official languages:**

Under this offer, services must be provided in English, unless otherwise specified.

### **1.5. PROJECT SCOPE OF WORK**

#### **1.5.1. New construction of a Multiuse Building:**

The Multi Use Building will house a discovery center (interior and exterior exhibit space), administration and maintenance garage /storage space and an exterior parking area on a lot located on Riverview Street. Design of the building must fully integrate the interior and exterior exhibit and should have the marine focus theme of Lake Superior NMCA. The building itself should be part of the Visitor Experience, and it's amenities should fulfill visitor's needs and create a great visitor experience in an exciting facility that gives visitors a sense of arrival and welcome to Lake Superior. It should link the interior and programming spaces with the design of the outdoor spaces to create continuity and connectivity between the two. There should be a clear arrival sequence incorporated into the design so that from the moment a member of the public reaches the parking lot, they understand that they are at Parks Canada National Marine Conservation Area on Lake Superior. A previously conducted Needs Analysis Space Allocation has been completed and validated by Parks Canada. This reference should guide the requirements for operational and office space. See appendix A- Pre-Design report. See also attached in appendix B- Visitor Experience Strategy for vision, mission and socio-economic context and considerations for the development of this multi-use building and surrounding site.

- a) The discovery center area is to provide a unique experience of discovery of the National Marine Conservation Area through its exhibit and its unique and distinctive architecture. It is also to provide a single portal (building + exhibit & interpretive display with indoor and outdoor elements) to receive visitors on the site, provide them with information and answer questions they may have and then channel them through the destination or experience of their choosing in NMCA and/or surrounding region. The design must incorporate an "Open Concept" design approach, ensuring visitor flow throughout the entire facility space, including welcome, reception, and interpretation linking interior and exterior exhibits. The outdoor space must offer a clear sense of place as a gateway to Lake Superior as part of the overall building design. The discovery center part of the multiuse facility shall contain significant integrated interior and exterior interpretation elements interwoven with the building. The exterior site plan must include design considerations for interpretive elements starting at the entry to the parking lot, through the parking area into the interior exhibit space, and from the interior exhibits out through the exterior exhibit areas. The discovery center and landscape should incorporate the findings from the Visitor Experience Strategy report, while respecting both the size and the budget for this

project.

- b) The design of the administration area must optimize space and offer quality, comfort, be efficient, practical and offer a great office environment in conformity with office 2.0 fit-up standards found at <https://www.tpsgc-pwgsc.gc.ca/biens-property/amng-ftp/cn-cu-eng.html>
- c) A maintenance garage/storage operational area will also be required. This space should be appropriate for use as a maintenance garage with room for the storage of materials, tools and seasonal equipment. Intended as non-heated storage area this space will also be used for minor work and for hanging and drying of equipment used by operational staff. This garage is included in the space allocation document.
- d) Exterior parking will also be a key consideration in finalizing the landscape design. It must accommodate staff, visitors, and local use, considering the Marina adjacent to the site. Recommendations for all parking areas that could be developed for expansion should be included in the design
- e) The Consultant will examine slab-on-grade, including an analysis of timber frame construction considering energy efficiency, passive house design criteria with the goal to achieve Passive house plus certification for the building excluding the discovery center. The new construction must demonstrate a high value relative to capital investment. The building must maximize the use of space.
- f) The building must be able to service the estimated 175 visitors per day during peak season. In short, the facility must be able to service approximately 15000 annual visitors during a 20-week peak visitation period from May 1 - September 30 annually. While lower visitation is expected during the winter months, school groups, families and teams in town for youth sporting events, and snowmobilers are expected to be among the off season user groups.
- g) Although the area attracts a variety of visitors from a variety of backgrounds and life stages, Parks Canada's prime target market is young families from urban areas. The primary focus of the discovery center should reflect the interests of those groups and appeal to families, young children and their parents. However, a large number of retired persons and couples travel to the region, and retaining the interest of those visitors is important for the site.

## **1.6. SITE DESCRIPTION AND SITE REQUIRED SERVICES**

### **1.6.1. Site description**

The site for the building is currently used as an RV and Boat parking lot by the Municipality. It consists of a hard packed gravel parking lot. The lot is also used by

local recreational boaters who launch at the marine and leave their truck while they enjoy the lake. There is over head electricity which runs across the entrance. The location has water and sewer services. The local marina is adjacent to the building location providing access to the Nipigon River mouth and lake which are part of the NMCA. A municipal campground, day use area and recreational hiking trails are also adjacent to and accessible from the property. A civil services study has already been completed and will be available

The site is located on parking lot as shown on this map



### 1.6.2. Environmental Assessment

- a. Environmental Site Assessment (ESA), Phases 1&2, will be completed by PCA.
- b. Basic Impact Assessment (BIA) to be completed by PCA will provide best management practices for construction that must be incorporated into the specifications as an appendix.
- c. The consultant will be responsible for providing information, analysis and evaluation on impacts on the environment and immediate landscape as a result of this project, including, for example, impacts to surface water runoff, analysis of flood plane etc.
- d. The consultant will also provide information on mitigation measures (example: including an oil/water separator in the storm water design, or mitigating run-off from any paved areas). The consultant will also assist in the permit process by preparing required documents, review and monitor site work of new building construction.

### 1.6.3. Land Survey

Land Survey including detail/topographic of Lake Superior NMCA building site has been completed. See attached in Appendix C. Additional services to provide final survey drawing and Real Property Report at the time of issuance of Occupancy Permit will be required.

### 1.6.4. Geotechnical Report

The client shall provide Geotechnical engineering services for the soil investigation report of the selected sites with foundation recommendation, groundwater monitoring, and to address groundwater issues with solutions during construction and after buildings are occupied.

## **2. PROJECT PARAMETERS**

### 2.1. BUDGET

The project scope must be tailored to meet the PCA budget. The project budget is estimated at 10 million dollars for this project including the site development and construction of the multi-use building. The exhibit budget is not included in this amount.

### 2.2. SCHEDULE

The Consultant shall submit a draft schedule for review within 5 working days after issuance of the contract to reflect the following High Level Project Milestones listed below:

#### 2.2.1. Project milestones

Activity	Estimated duration/ End date
Consultant Contract Award	Baseline
Planning report	4 weeks
Client review and feedback	1 week
Pre-design report	4 weeks
Client review and feedback	1 week
Schematic design report	4 weeks
Client review and feedback	1 week
Design development report	8 weeks
Client review and feedback	1 week
Construction document 33%	4 weeks
Client review and feedback	1 week
Construction document 66%	8 weeks
Client review and feedback	1 week
Construction document 99%	8 weeks

Client review and feedback	1 week
Construction document 100%	2 weeks
Client review and feedback	1 week
Tender Period	8 weeks
Construction	50 weeks
<b>Total</b>	<b>108 weeks</b>

### **2.2.2. Occupant considerations**

The consultation and interviews with Lake Superior NMCA partners and broader stakeholder community for the exhibit/ interpretation design is planned to occur during Spring of 2019 conducted by the Exhibit Design Consultant.

### **2.2.3. Items that could Impact Project Completion Schedule**

The following are potential issues that could delay or impact the project, which the Consultant should take into consideration when preparing the detailed schedule:

- a) Information on documentation might not be accurate or sufficient and further investigation will need to take place;
- b) Delays in exhibit/interpretation design consultations.

## **2.3. EXISTING DOCUMENTATION**

Subject to applicable security restrictions, the Consultant will be given access to existing drawings, survey notes, design notes, specifications or reports that will aid in the work after contract award. All such documents must be returned to the Departmental Representative on completion of the contract.

The existing drawings and documents provided for this project are to be treated as reference material only. PCA cannot ensure their completeness and accuracy. As such the Consultant is responsible to review and confirm all information and inform PCA of any discrepancies.

### **2.3.1. The following is a list of documents available for your reference (Attached in One drive):**

- a) Site map
- b) Extension of Municipal Services – Nipigon contract specs and tender documents including geotechnical information
- c) Addenda of the project of Extension of Municipal Services
- d) Vision, mission and socio-economic context and considerations for the development of this multi-use building and surrounding site.
- e) Lake Superior NMCA - Visitor Experience Strategy report
- f) Space requirements analysis for operational and office space
- g) Crime prevention through environmental design document
- h) Workplace 2.0 standard
- i) Perkins Will pre-design report
- j) Environmental assessment

## **3. REQUIRED SERVICES**

### **3.1. GENERAL**

1. PCA will act as the Project Manager for the duration of the project. The Consultant must adhere to the Documentation and Submission Standards established by PWGSC outlined in the documents in Doing Business with PWGSC in Appendix F of this Term of Reference (TOR).
2. The Consultants shall provide a full range of relevant architecture, landscape architecture, civil engineering, geotechnical engineering, environmental engineering, structural engineering, mechanical engineering, electrical engineering, code expertise, cost expertise, building science expertise, passive house expertise and certification services, including, but not limited to planning, design, construction administration and post-construction services.
3. The administrative portion of the building shall be certified to the International Passive House Standard as Passive House Plus. Design, construction and operation of the building shall all meet the international Passive House standard. Energy performance metrics are per the international passive house standard and as follows:
  - a. **Space Heating Demand** not to exceed 15kWh annually OR 10W (peak demand) per square meter of treated floor area
  - b. **Space Cooling Demand** not to exceed 15kWh annually OR 10W (peak demand) per square meter of treated floor area with an additional, allowance for dehumidification to be assessed during design
  - c. **Primary Energy Demand** not to exceed 120kWh annually for all applications (heating, cooling, hot water and electricity) per square meter of treated floor area
  - d. **Airtightness** maximum of 0.6 air changes per hour at 50 Pascals pressure (as verified with an onsite pressure test in both pressurised and depressurised states and according to the international passive house standard)

The Passive House Consultant must ensure the project is planned, optimised and verified with the Passive House Planning Package (PHPP) based on the climate data for the location of the project validated by the international passive house institute.

Full building passive house certification criteria is available at this link [https://passiv.de/downloads/03\\_building\\_criteria\\_en.pdf](https://passiv.de/downloads/03_building_criteria_en.pdf)

4. For Interpretive Exhibit services, PCA, through their Exhibit Design, Fabrication and Installation Supply Arrangement (5P306-7797326) will select a pre-qualified firm specializing in exhibit development through a competitive process. These firms have expertise and extensive recent relevant experience providing exhibit services similar to those required in this Term of Reference. The Prime Consultant is responsible to coordinate and integrate their design

work with the work of the architectural project team.

## CONSULTANT RESPONSIBILITIES

The Consultant;

- .1 Provides Architectural and Engineering Services.
- .2 Is responsible for the completion and quality of the work completed of any sub consultants.
- .3 Is responsible for coordinating the work of all professional disciplines required, from the Project Planning, Design and Construction Administration through to the Post Construction Stages.
- .4 Is responsible for coordinating with PCA's and stakeholders' team such as the Site manager, VE manager Asset manager, project leader etc., furniture, exhibits design, signage and other interpretive elements, graphic design and temporary alternative solutions during the design and construction period.
- .5 Is responsible to coordinate the services of the exhibit designer team that will be provided by a separate consultant that will be hired by PCA directly; the consultant will have to work in collaboration with this exhibit consultant for the design of the discovery center area and coordinate his work to ensure the project is on schedule and budget achieves project goals. See attached ToR for the exhibit/ interpretation consultant in Appendix D.
- .6 To carry Passive House design, quality assurance and control at all stages of the project and until final certification. Prime Consultant team to hire a passive house certifier and to coordinate Passive House Certification process throughout the project, and ensure all the team is fully versed on requirements before any specifications or drawings are issued. The Passive House Certification requirements must be strictly followed to ensure successful passing of testing at completion. The Consultant team must include at minimum one (1) passive House designer or consultant certified by the International Passive House Institute. List of qualified certified passive House designers in Canada is available at this link <http://www.passivhausplaner.eu/mitgliederdatenbank.php>

## CONSULTANT SERVICE REQUIREMENTS

Overview

- .1 The PCA Representative will act as the Project Manager. The Consultant must adhere to "Doing Business with PWGSC" attached in Appendix E to the ToR.
- .2 Provide 1 design option, and present it at the end of the Schematic Design Stage to the PCA management team.

- .3 The Consultant shall deliver integrated architectural and engineering services, in distinct stages, as follows:

Project Planning:

Design:

- Pre-Design/Concept Design
- Schematic Design
- Design Development
- Construction Documentation

Construction Administration:

- Tender Call and Bid Evaluation
- Construction Supervision Services and Contract Administration
- As-built record documents

Post Construction:

- Warranty inspection and supervision
- Project Close Out

- .4 The outline of deliverables and process, as presented in each stage, are intended as a general outline only. It is not exhaustive and does not preclude additional, alternative or supplementary approaches as may be suggested by the Consultant for consideration by the PCA Representative.
- .5 The Consultant shall provide a Consultant fee forecast as per the government financial year. The Consultant shall update this forecast as required.

After contract is awarded, the Consultant shall provide project cost forecast as per government financial year. The Consultant shall update this forecast as required and/or requested by the Project Manager.

### **3.2. PROJECT PLANNING SERVICES**

#### **GENERAL REQUIREMENTS**

1. The purpose of this required service is to ensure the Consultant has reviewed all the project documentation, the integrated project requirements, identified and evaluated conflicts or problems, provided alternative strategies, presented and received approval on a Project scope, delivery process, schedule and 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. This information will be integrated in the project planning report- see project planning report content below.
2. The following list identifies those reports which are required for the project and must be produced/provided by the Consultant.

#### **Project planning report content:**

- .1 Preliminary Project Reports
- .1 Feasibility Studies;
- .2 Interpretive Exhibit Integration Analysis - Interpretive Exhibit Plan includes; Objectives, Target Audience, Interpretive Themes, Messages, Storylines to be provided to the Architectural team by the Exhibit consultant.
- .2 Site Audit Report

- .1 Site Conditions Report
- .2 Investigation Report
  
- .3 Cost and Scheduling Reports
  - .1 Implementation Strategy and Schedule Report
  - .2 Order of Magnitude Cost Report
  
- .4 Environmental and Sustainable Design Reports (including, but not limited to Environmental, Passive House certification impact, etc.).

### **3.3. PRE-DESIGN SERVICES**

#### **GENERAL REQUIREMENTS**

1. Based on the Term of Reference (ToR), the scope of services includes analysis of Project Requirements and review of deliverables and the Consultant must propose adjustment if needed..
  
2. Obtain written authorization from the PCA Representative before proceeding with Pre-Design Services (Analysis of Project Requirements).
  
3. Review and report on all aspects of the project requirements. The Consultant will further review and analyze all available program information, consult with PCA and Authorities Having Jurisdiction and deliver a comprehensive and integrated Pre-Design Report. This report will form the basis for the scope of work for the remainder of the project and will be utilized throughout the project to guide the project delivery.
  
4. Prepare one (1) conceptual plan for the multi-use building. Provide a sense of scale, building massing, siting, including parking, traffic flow and landscaping. The purpose of this conceptual plan is to assist PCA in their decision making. This conceptual plan will be presented to the PCA management team at the end of Pre-Design Stage.

#### **ROLE OF PCA**

PCA will:

- .1 Provide all available background reports, visitor and technical data;
- .2 Provide functional program ;
- .3 Provide all available drawings and plans;
- .4 Review and provide a quality assurance report on the Consultant's Pre-Design Report;
- .5 Review revisions and Consultant response to the PCA quality assurance report;
- .6 Review and Approve the detailed work breakdown structure for the project;
- .7 Review and Approve the final Pre-Design Report;
- .8 Authorize Consultant to proceed to Schematic Design;
- .9 Direct concept planning and liaison with all other PCA staff;
- .10 Provide Archaeological services – when required;
- .11 Liaise on all functional areas with PCA staff.

## RESPONSIBILITIES OF THE CONSULTANT

The scope and activities of the Consultant shall include but are not limited to the following:

- .1 Administrative:
  - .1 Provide information and advice during the Project Start-up meetings and workshops (6-8 workshops are expected);
  - .2 Outline the quality management process that the Consultant will use;
  - .3 Confirm that all necessary pre-design documentation required for this project is available and confirm that all information is still current and up-to-date. Notify the PCA Representative of any missing and/or out-of-date reports.
- .2 Codes and Regulatory Analysis:
  - .1 Review and analyze regulatory and statutory requirements;
  - .2 Identify and verify all authorities having jurisdiction over the project;
  - .3 Identify applicable codes, regulations and standards; and
  - .4 Prepare Codes and Regulatory Analysis section of the Pre-Design Report
- .3 Program Analysis:
  - .1 Review and analyze all available reports, studies and data provided by PCA.
  - .2 Prepare Program Analysis section of the Pre-Design Report.
  - .3 Establish detailed functional requirements for the new installations building on preliminary input from PCA.
- .4 Site Analysis:
  - .1 Review and analyze all available reports, studies and data provided by PCA
    - .1 Existing site conditions;
    - .2 Existing site plans;
    - .3 Subsurface reports (geotechnical);
    - .4 Surface reports (survey);
    - .5 Municipal infrastructure: Note any field investigations that will be required to verify and / or confirm existing site utilities and their capacities;
    - .6 Historical site features;
    - .7 Archaeological site features;
    - .8 Environmental site features, including sustainable design strategy (i.e. storm water), wild life and Environmental Impact Assessment;
  - .2 Prepare Site Analysis section of the Pre-Design Report.
5. Building Analysis:
  - .1 Including all functional considerations and future uses for building;
    - .1 Floor plans, elevations;
    - .2 Building area;
    - .3 Building massing;
    - .4 Budget, Schedule and Risk Analysis:
      1. Prepare Budget estimate, Schedule and Risk Analysis section of the Pre-Design Report.
      2. Review and analyze the project budget and schedule data, constraints and opportunities;

3. Advise and recommend budget and schedule modifications and outline risk implications and mitigation strategies;
4. Prepare Class D estimate;
5. Prepare risk implications and mitigation strategies;

## **DELIVERABLES**

The Consultant shall develop and complete the following deliverables:

1. Pre-Design Report:
  - .1 Prepare and submit an integrated Pre-Design Report which includes all functional considerations for review and approval by the PCA Representative.
  - .2 Revise as required by the PCA Representative and resubmit for acceptance.
  - .3 The Report will consolidate the Consultant Service Requirements identified above and will be utilized as the benchmark project control document to monitor progress of the project.
  - .4 The Report will be used as a basis for monthly reporting of progress and will require supplements and modifications to reflect changes in project parameters as may be identified and approved throughout the project life cycle.
  - .5 Provide sustainable opportunities, strategies, and preliminary budgets to achieve passive house plus certification within budget.
  - .6 Integrate energy and resource conservation technologies into the design: technology shall not be an after-thought employed to correct fundamental design deficiencies
  - .7 Achieve energy conservation through passive solar design and the passive house methodology.
  - .8 Use sustainable materials with least environmental impact based on embodied energy, embodied water, embodied emissions and recycled content. Material selection must meet the responsible industry living building imperative and avoid materials on the living building red list.
  - .9 Use of FSC wood shall be considered as the preferred construction material wherever economically competitive.
  - .10 Target design construction and operation of the building with space heating and cooling demand of International Passive House plus standard.

### **Pre-Design Report Content shall include but is not limited to the following:**

- .1 Executive Summary - intended to provide a precise Pre-Design Report and outline any recommendations requiring PCA approval;
- .2 Codes and Regulatory analysis;
- .3 Program analysis; Program analysis is to compare the client needs versus space and function indicated in the program
- .4 Site analysis and parking plan;
- .5 Sustainability requirements for passive house:
  - Include compactness, orientation, and shading, location of the thermal envelope and optimization of thermal bridges.
  - Use related adopted data such as indoor temperature, relative humidity, usage occupancy rate and internal heat sources. All assumptions shall be validated by PHI or the Certifier for energy modelling.
  - Include Building services concept, ventilation in summer/winter, heating/cooling, hot water generation, minimization of the energy demand, pre-selection of bldg. services components and identification of innovative approaches for temperature control and dehumidification.

- Preliminary Energy balance and calculation with the PHPP.
- .6 Building and Exhibit Analysis including all functional considerations and future uses for interior and exterior of the building/exhibit;
- .7 Interpretive/Exhibit program analysis; responsibility of the Exhibit consultant under a separate contract. Coordinate with PCA team to integrate this in the predesign report.
- .8 Budget; provide indicative estimate (+25- 20%), Schedule and Risk analysis
- .9 Response to PCA Quality Assurance Report.

### **3.4. SCHEMATIC DESIGN SERVICES**

#### **GENERAL REQUIREMENTS**

- .1 The Consultant must obtain written authorization from the PCA Representative before proceeding with Schematic Design.
- .2 The objective of the Schematic Design stage is to explore one design scheme, to allow comparison, analysis against project requirements and selection of a design direction for preparation of a final design concept.
- .3 Schematic Design is to be presented in sketch format (single line, to scale), fully integrated and supported by architectural solutions, along with massing models, interpretation options, parking options, site photographs and narrative description.
- .4 Consultant shall prepare a preliminary copy of the Schematic Plans for PCA Representative to review. Consultant shall update the Schematic Plans by incorporating PCA Representative's comments and submit to PCA Representative 3 weeks prior to Key Community Stakeholder meeting. The Consultant will produce public display presentation materials for the Key Community Stakeholder meeting in digital and hardcopy.
- .5 Consultant shall attend Key Community Stakeholder meeting and be prepared to answer specific enquiries when requested.

#### **ROLE OF PCA**

PCA will:

- .1 Organize the integrated Design Workshops;
- .2 Review and comment on preliminary Consultant submissions;
- .3 Review and provide a quality assurance report on the Consultant's Schematic Design Report;
- .4 Review revisions and Consultant response to the PCA quality assurance report;
- .5 Review and accept the amended work breakdown structure for the project;
- .6 Review and accept the final Schematic Design Report;
- .7 Organize Key Community Stakeholder meeting and be present during the meeting;
- .8 Authorize Consultant to proceed to Design Development; and
- .9 Liaise on all functional areas with PCA staff.

#### **RESPONSIBILITIES OF THE CONSULTANT**

The Consultant scope and activities shall include but are not limited to the following:

- .1 Architectural:

- .1 Administrative:
  - .1 Manage and provide information and advice during integrated Design Workshops;
  - .2 Confirm quality management process for the Consultant.
- .2 Regulatory: prepare Preliminary code analysis and regulations analysis.
- .3 Site Analysis , prepare site plans including:
  - 1. Site features and restrictions, based on recent survey drawings;
  - 2. Influences and existing structures;
  - 3. Subsurface features;
  - 4. Historical site features;
  - 5. Archaeological site features; and
  - 6. Environmental site features including sustainable design strategies (i.e. storm water management, hard and soft landscaping, including parking, waste management (garbage bin location and ease of access for maintenance staff), Environmental Impact Assessment etc.).
  - 7. Passive house plus design feasibility, constraint and opportunities
- .4 Prepare 1 Design Option:
  - 1. Functional Considerations, the Consultant shall provide detailed functional considerations for the various designs they create;
  - 2. Schematic building floor plans showing all spaces in the functional program and Exhibit/Interpretive space, linking interior and exterior spaces;
  - 3. Sketch elevations and sections indicating basic design approach and aesthetic philosophy;
  - 4. Sketch perspectives and massing studies;
  - 5. Gross building areas and summary of main welcome, reception and information areas required and proposed.
- .5 Budget Estimate, Schedule and Risk Analysis, prepare and update:
  - .1 Updated budget and provide an updated indicative estimate
  - .2 Milestone project schedule including allowances for reviews and approvals for each stage of the project life cycle; and
  - .3 Risk implications and mitigation strategies.
- .6 Prepare Schematic Plans. Attend Key Community Stakeholder meeting and be prepared to answer specific enquiries when requested.
- .7 Structural:
  - .1 Proposed structural systems including foundation methods, explanatory sketches, etc. and a copy of the site-investigation report on which the design is based;
  - .2 Initial seismic, wind, snow, rain and loading analysis based on site-specific features and climatic conditions.
- .8 Mechanical:
  - .1 The schematic design submission shall include a description of specific mechanical requirements and function for each area in the project. Identify any unique or specialized equipment required by the facility. Incorporate in the submission a schedule of requirements listing all rooms and identify the mechanical building services to be provided.
  - .2 Provide single line diagrams of mechanical systems for: sprinklers (if needed) domestic water heating system, air conditioning, humidification, dehumidification, indoor temperature/RH set points, outdoor design temperature/RH (summer and winter) and rain, fall intensity, allow for climate

change.

- .3 Explain in the concept submission the manner in which the proposed mechanical systems correlate with user requirements.
  - .4 Identify the volume of outdoor air to be supplied per person.
  - .5 Identify the delivery rate of supply air to occupied spaces.
  - .6 Identify whether fulltime operating staff will be needed for operating any of the mechanical equipment. Differentiate between staff needed by code requirements versus staff needed because of the nature and size of the facility.
  - .7 Identify existing and proposed size, capacity and location of entry points into the building of all mechanical services.
  - .8 Identify in square meters the area to be provided for mechanical rooms and then identify what percentage of total building area this represents. Identify location of mechanical horizontal and vertical spaces in the building.
  - .9 Analysis of alternative mechanical schemes at the schematic 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 lifecycle cost analyses in order to determine the most beneficial mechanical systems alternative. Lifecycle cost analyses shall be based on a projected building life of 50 years.
  - .10 Carry out energy analysis on system alternatives.
  - .11 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/m<sup>2</sup> per year.
  - .12 Submit a complete energy analysis using a Canadian-recognized energy analysis tool.
  - .13 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.
  - .14 Propose water consumption and wastewater amount for the design of the building systems and tie-in with available utility lines.
- .5 Electrical:
- .1 Identify existing and propose basic electrical systems of significance to the early design, including but not limited to: life safety, power (regular/emergency), lighting, communication (radio/voice/data/optic fiber), TV (cable/satellite/optic fiber) and security.
  - .2 Site plan showing existing location of equipment and service entrances.
  - .3 Distribution diagram showing single line diagrams to distribution centers.
  - .4 Floor plans complete with locations of major electrical equipment and distribution centers.
  - .5 Communication systems: identify existing communication systems including radio, emergency, phone, data, optic fiber and cable systems. Include a proposed systems description.
  - .6 Propose Communication Rooms, conduits, radio and telecommunication cable or fiber optic systems, layout and requirements.
  - .7 Provide an electrical design synopsis, describing the electrical work in sufficient detail for assessment and approval by the PCA Representative. Include feasibility and economic studies of proposed systems complete with cost figures and loads; power consumption and energy management.
  - .8 Propose protection to all electrical systems.

- .6 Commissioning:
  - .1 Define Commissioning Requirements and Commissioning Team.
  - .2 Provide preliminary Commissioning Plan.
  - .3 Identify in square meters the area to be provided to maintenance personnel, including storage and workshops for mechanical, electrical and housekeeping.
  - .4 Define project verification archives (data storage and retrieval system).
  
- .7 Environmental:
  - .1 PCA will produce a Basic Environmental Impact Assessment, based upon the Townsite Model Class screening criteria and standard mitigations for buildings contained therein,
  - .2 Prepare Waste Management Plan.
  - .3 Confirm site-specific requirements with the PCA Representative, including, but not limited to flood prevention.
  
- .8 IT/security:
  - .1 Identify any security issues
  - .2 Incorporate Crime Prevention through Environmental Design (CPTED) concepts in architectural design. Take a proactive approach to crime prevention through Natural Surveillance, Access Control, Territorial Reinforcement, etc.

## **DELIVERABLES**

### Schematic Design Report:

- .1 The Consultant shall prepare and submit a Draft Schematic Design Report for review and acceptance by the PCA Representative.
- .2 Revise as requested by the PCA Representative and resubmit for formal acceptance.
- .3 The Report will update the Pre-Design Report, consolidate the Service Requirements identified above and will continue to be utilized as the benchmark project control document to monitor progress of the project. The Schematic Design Report shall be web-enabled.
- .4 The Consultant shall deliver presentations at a session arranged by the PCA Representative.

### **Schematic Design Report Content shall include but is not limited to the following:**

- .1 Executive Summary: it is intended to provide an outline of any recommendations requiring PCA Representative approval.
- .2 Codes and Regulatory Analysis:
  - a. Prepare Preliminary code analysis and regulations analysis,

- b. Identify authorities having jurisdiction.
- .3 Program Analysis and Options.
- .4 Exhibit, signage and interpretive elements: Interpretive plan, Concept Design - including 3D Design brief and Design brief. **This is part of scope of work of the exhibit design consultant in a different contract.** Collaborate to include this in the schematic report.
- .5 Analysis and Schematic Design Drawings:
  - a. Site Analysis and Design Options (include parking strategy),
  - b. Building Analysis and Design Options, including the interpretive components.
- .6 Indicative estimate +20,-15%, Schedule and Risk Analysis.
- .7 Response to PCA Quality Assurance Report.
- .8 Commissioning Plan.

### 3.5. DESIGN DEVELOPMENT SERVICES

#### GENERAL REQUIREMENTS

The objective of the Design Development stage is to further refine and develop the design option selected at the Schematic Design stage.

The Consultant must obtain written authorization from the PCA Representative before proceeding with Design Development.

#### ROLE OF PCA

PCA will:

- .1 Organize the Integrated Design Workshops;
- .2 Review and comment on preliminary Consultant submissions;
- .3 Review and provide a report on the Consultant's Design Development Report;
- .4 Review revisions and Consultant response to the PCA quality assurance report;
- .5 Review and accept the final Design Development Report;
- .6 Liaise on all functional areas with PCA staff; and
- .7 Authorize Consultant to proceed to Construction Documents.
- .8 Submit rezoning application, if required.

#### RESPONSIBILITIES OF THE CONSULTANT

The Consultant scope and activities shall include but are not limited to the following:

- .1 Architectural:
  - a. Administrative:
    - .1 Manage and provide information and advice during integrated Design Workshops and meetings;
    - .2 Confirm quality management process for the Consultant; and
    - .3 Update quality management process for the Consultant.
    - .4 Assist to apply for township submission, preparation of required documents and drawings.
  - b. Regulatory - refine, develop and prepare:
    - .1 Detailed code analysis,
    - .2 Detailed regulations analysis

- .3 Present design to the Authorities Having Jurisdiction and obtain their preliminary review comments.
- c. Building Design:
  - .1 The Consultant is responsible for all design activities including but not limited to:
    - .1 Site and Landscape plan:
      - .1 Site features and restrictions (i.e. topographical features, climatic influences, setback requirements, easements, URoW (ReLi), existing buildings and/or structures, parking, layout, wayside exhibits, exterior signage, interpretation panels/nodes, etc.);
      - .2 Subsurface features and above grade infrastructure/services, including type, capacities and limitations (i.e. storm water drainage, fire protection, domestic water, sewer, power, telecommunications etc.);
      - .3 Archaeological and Historical site features in collaboration with PCA internal team.
      - .4 Environmental site features including sustainable design strategies (i.e. storm water management, landscaping etc.)
    - .2 Floor Plans of each floor showing all accommodation required with room names and calculated areas, including all necessary circulation areas, stairs, elevators, etc. and ancillary spaces anticipated for service use. Indicate building grids, modules, etc., and key dimensions.
    - .3 Fixture, Furniture and Equipment plans which include, but are not limited to: a report detailing the functional considerations for the space/building – how those would look, where they would be situated, recommendations for best material;
    - .4 Roof Plan showing slope, drainage, roof top equipment
    - .5 Cross-sections through the building(s) to show floor levels, room heights, exterior-grade elevations and roof height;
    - .6 Detail Sections of walls, building-envelope design features or other special design features requiring illustration and explanation at this stage, including fireproofing methods;
    - .7 Partition plans, reflected ceiling plans, finish schedules, door/window schedules;
    - .8 Elevations showing proportion/massing, material type and size, color, texture, finishes, height, floor level, exterior grade;
    - .9 Standard details and special details;
    - .10 Sustainable design summary of strategies; and
    - .11 Provide NMS specifications, including identification of all components and finishes and sustainable procurement strategies.
  - .2 Budget, Schedule and Risk Analysis - update and prepare:
    - .1 Indicative estimate at +10, -15 % confidence level estimate supported by risk analysis.
    - .2 Project schedule modifications, including allowances for reviews and approvals for each stage of the project lifecycle;
    - .3 Risk implications and mitigation strategies
  - .3 Structural:
    - a. Drawings indicating the proposed structural framing system, structural materials and standard, significant or unusual details proposed. Provide separate structural drawings. Include a copy of the structural load/data

- analysis on which the design is based;
  - b. Update seismic and loading analysis based on site-specific soil conditions and climatic conditions.
- .4 Mechanical:
- a. Site Plan showing service entrances for water supply, sanitary and storm drains and connections to utility services, including all key invert elevations;
  - b. Drawings showing preliminary sizing of ventilation, cooling and heating systems showing locations and all major equipment layouts in mechanical rooms;
  - c. Drawings of plumbing system, showing routing and sizing of major lines and location of pumping and other equipment where required;
  - d. Drawings of the fire protection systems showing major components;
  - e. Produce preliminary designs based on the approved schematic design. Update the energy analysis and energy budget established at the schematic design stage;
  - f. Update the schedule of requirements;
  - g. 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;
  - h. Analysis of selected equipment and plant with schematics and calculations sufficient to justify the economy of the selected systems;
  - i. Describe the mechanical systems and the components of each system. Describe the operation of the mechanical systems;
  - j. Explain what operating staff will be needed to operate the building systems and the expected functions of the operation staff;
  - k. Describe the building systems control architecture. Provide preliminary EMCS network architecture, mechanical control schematics and sequence of operation;
  - l. Explain what acoustical and sound control measures are to be included in the design.
- .5 Electrical:
- a. Provide drawings showing advanced development of all the systems.
  - b. Provide the following data:
    - .1 Total connected load.
    - .2 Maximum demand and diversity factors.
    - .3 Sizing of standby load.
    - .4 Short-circuit requirements and calculations showing the ratings of equipment used.
  - c. Electrical drawings with:
    - .1 Floor elevations and room identification.
    - .2 Legend of all symbols used.
    - .3 Single line diagram of the power circuits with their metering and protection, including:
      - .1 Complete rating of equipment.
      - .2 Ratios and connections of CTs and PTs.
      - .3 Description of relays when used.
      - .4 Maximum short-circuit levels on which design is based.
      - .5 Identification and size of services.
      - .6 Connected load and estimated maximum demand on each load centre.

- .4 Circuit numbers at outlets and control switching identified.
  - .5 All conduit and wire sizes except for minimum sizes which should be given in the specification.
  - .6 A panel schedule with loadings for each panel.
  - .7 Telephone conduits system layout for ceiling/floor distribution
  - .8 Riser diagrams for lighting, power, telephone and telecommunication cable systems, fire alarm and other systems.
  - .9 Elementary control diagrams for each system.
  - .10 Schedule for motor and controls.
  - .11 Complete lighting layout and fixture schedule clearly indicating methods of circuiting, switching and fixture mounting.
  - .12 Electric heating layout and schedule.
- .6 Commissioning:
    - a. Define Commissioning and Operation Requirements and Commissioning Team.
    - b. Provide preliminary Commissioning Plan.
    - c. Prepare a Commissioning Brief describing major commissioning activities for mechanical, electrical and integrated system testing.
    - d. Define and establish project specific archives.
  - .7 Environmental:
    - a. Update Waste Management Plan.
    - b. Develop Design and explore positive environmental strategies.

## **DELIVERABLES**

### Design Development Report:

- .1 The Consultant shall prepare and submit a Draft Design Development Report for review by the PCA Representative.
- .2 Revise as requested by the PCA Representative and resubmit for formal acceptance.
- .3 The Report will update the Schematic Design Report, consolidate the Service Requirements identified above and will continue to be utilized as the benchmark project-control document to monitor progress of the project. The Design Development Report shall be web-enabled.
- .4 The Consultant shall deliver presentations at a session arranged by the PCA Representative. During this session the Consultant will present, in a power point format or any other presentation format, the outcome of the design development report.

### **Design Development Report content shall include but not be limited to the following:**

- .1 Executive Summary: is intended to provide an outline of any recommendations requiring PCA Representative approval.
- .2 Codes and Regulatory Analysis - update code analysis and regulations analysis.
- .3 Prepare and submit a written response to the PCA Representative to all comments provided by PCA.
- .4 Coordinate with exhibit design consultant to get the updated Exhibit, signage and interpretive elements.

- .5 Coordinate discipline drawings.
- .6 Indicative estimate at +10, -15 % confidence level estimate supported by risk analysis, and updated schedule.
- .7 Response to PCA Quality Assurance Report.
- .8 Update Environmental Impact Assessment Report.
- .9 Update Commissioning Plan.
- .10 Passive House certifier evaluation of:
  - a. Building envelope design relevant to energy efficiency (windows, door, thermal insulation, airtightness target)
  - b. Airtightness strategy and critical airtightness at important connection details
  - c. Thermal bridging
  - d. Building services: Dimensioning and layout of the ventilation system with heat recovery. Temperature control and Building Automation System strategy. Identify heating and cooling strategies.
- .11 Updated Energy balance and calculation with the PHPP
- .12 Prepare Development Permit submission package, including but not limited to: drawings, specifications, required reports and documents, in both digital copy and paper copies along with three (3) duplicate copies of the material finishes and color board.  
Assist PCA Representative to apply for Development Permit, follow-through with the Permit process and provide assistance until the Permit is issued. Update approved Permit submissions and re-submit as required.

### **3.6. CONSTRUCTION DOCUMENT SERVICES**

#### **GENERAL REQUIREMENTS**

The objective of the Construction Document stage is to prepare tender-ready construction drawings and specifications, setting forth in detail all the requirements for the construction of the project along with a Class A ( +5%, -10%) cost estimate.

The Consultant must obtain written authorization from the PCA Representative before proceeding with Construction Documents.

#### **ROLE OF PCA**

PCA will:

- .1 Organize Integrated Design Review Sessions at 33%, 66% and 99%, 100% stages through the construction documentation stage, as required;
- .2 Review and comment on each Consultant submission;
- .3 Respond to questions from the Consultant as required,
- .4 Review revisions and Consultant response to the PCA quality assurance report;
- .5 Review and accept the final the Construction Document progress at 33%, 66%, 99% and 100%; and
- .6 Formally accept documents ready for Tender and Construction.
- .7 Liaise on all functional areas with PCA staff.

#### **RESPONSIBILITIES OF THE CONSULTANT**

The Consultant Scope and activities shall include but are not limited to the following:

- .1 Administrative:
  - .a Manage and provide information and advice during integrated Design

- Review Sessions and meetings;
  - .b Update quality management process for the Consultant.
- .2 Regulatory:
- .a complete detailed codes and regulations analysis.
  - .b provide Building Permit package review by the Safety Codes Officer with a review report, indicating the design complies with all the code requirements (National and Ontario Building Codes, National and Ontario Fire Codes and all other related safety codes).
- .3 Scope and Activities:
- .a Submit drawings and specifications at 33%, 66%, 99% and 100% stages.
  - .b Obtain acceptance for each submission at 33%, 66%, 99% and 100% stages.
  - .c Provide written response to all review comments and incorporate them into Construction Documents.
  - .d Confirm format of drawings and specifications.
  - .e Clarify special procedures (i.e. phased construction).
  - .f Advise as to the progress of cost estimates and submit updated cost estimates as the project develops.
  - .g Update the project schedule.
  - .h Update the estimate at the 66% complete design stage and provide a Class A estimate at the 99% complete design stage.
  - .i Submit all architectural and engineering calculations. Calculations submitted might not 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.
  - .j Review and approve materials, construction processes and specifications to meet sustainable development objectives.
- .4 Technical and Production Meetings:
- a. Production of construction documents will be reviewed during the meetings arranged by PCA Representative and Consultant.
  - b. Representatives from PCA will be present as arranged by the PCA Representative.
  - c. Consultant shall ensure that his staff and any sub-Consultant representatives attend the technical and production meetings.
  - d. Consultant shall ensure all documents are coordinated with all sub-Consultants and disciplines as applicable.
  - e. Consultant shall arrange for all necessary progress prints, data, product information etc.
  - f. Consultant shall prepare minutes of the meetings and distribute copies to all participants.
  - g. Prepare and submit a written response to the PCA Representative, to all comments provided by PCA.

## **GENERAL DELIVERABLES**

Deliverables are similar at all three – 33%, 66% and 99% stages, though the level of detail presented is meant to increase as the project progresses through the stages while the level of uncertainty and items outstanding is meant to decrease.

Deliverables at 100% stage are tender ready and issued for construction (IFC).

### **33%, 66%, 99% SUBMISSION DELIVERABLES**

Completeness of the work should reflect the stage of each submission at 33%, 66% and 99%.

Aspects to be included are identified below and are the same for each submission stage.

For submission at each stage:

- .1 Submit written response to the PCA Representative review comments made at previous submission.
- .2 Submit a final report on the application of Sustainable Development principles and strategies for the project to the current stage.
- .3 Submit one copy of updated Cost Plan, draft Substantive cost estimate at 66% completion.
- .4 Submit one copy of updated Cost Plan, final Substantive cost estimate at 99% completion.
- .5 Submit one copy of updated Project Schedule.
- .6 Provide final code analysis. Information on drawings must fully comply with codes, federal standards, PCA requirements and all other requirements.
- .7 Drawings and Specifications:
  - a. All construction drawings and edited specifications - fully complete.
  - b. Complete set of coordinated construction drawings and specifications, including all details, suitable for final review and effective construction funding approval.
  - c. Written contributions specific to the tender form and Invitation to Tender, as may be required.
  - d. Passive House certifier evaluation of
    1. Thermal bridging calculation
    2. Specification of material components related to energy efficiency
    3. Hygro-thermal performance of the envelope
    4. Updated Energy balance and calculation with the PHPP

### **100% SUBMISSION STAGE – FINAL TENDER DOCUMENTS**

Deliverables:

- .1 Written response to the PCA Representative review comments made at 99% stage.
- .2 All original reproducible drawings, tender documents and specifications for tendering purposes, 100% reviewed and coordinated, incorporating all PCA comments made at the 99% stage
- .3 All specification sections and an index of specifications. The specifications shall consist of typed and edited NMS sections.
- .4 Passive House institute or the certifier formal pre-certification letter
- .5 Updated project implementation schedule.
- .6 Final Substantive cost estimate.
- .7 Two (2) duplicate copies of signed and sealed, digitized documentation requirements, specifications and drawing files, in both original and PDF (Portable Document Format), bookmarked by section to PCA Representative for tender and construction.
- .8 Plans and specifications reviewed and approved in a report format by the Safety Codes Officer before tender call. The approval report indicates the design complies with all the code requirements (National and Ontario Building Codes,

- National and Ontario Fire Codes and all other related safety codes).
- .9 Assist PCA Representative to apply for Building Permit, follow through with the Permit process and provide assistance until the Permit is issued. Update approved Permit submission and re-submit as required.

### **3.7. TENDERING SERVICES**

#### **GENERAL REQUIREMENTS**

1. PSPC will undertake public tendering of the construction contract for this project. Support PCA and PSPC in development of indigenous business procurement process.
2. The Consultant's original Construction Documents (signed and sealed) are used to issue to the Government Electronic Tendering System (GETS) ([Buyandsell.gc.ca](http://Buyandsell.gc.ca)) and to produce sets of prints required for tender call.
3. After printing, the originals are retained by PCA and the Consultant is provided with sets of prints as needed, for use by the Consultant during the tender and construction phases.

#### **BIDDERS CONFERENCE**

1. During the tender period, the Contracting Authority may unilaterally or, at the request of a potential offer, arrange a Bidders Conference to clarify its requirements.
2. The Consultant with their Sub-Consultants and Specialist Consultants must attend any tender meeting and all mandatory site meetings.
3. Questions arising in such meetings will be answered by written addenda only, issued by the Contracting Authority.
4. All enquiries from bidders during the tender period will be sent to the Contracting Authority named on the front page of the Invitation to Tender, without providing any information to the enquirers. The Contracting Authority will obtain technical answers through the PCA Representative and will publish both questions and answers to all bidders at the same time and will issue clarifications.

#### **DOCUMENT INTERPRETATION**

Provide the PCA Representative with all information required by tenderers to fully interpret the Construction Documents, including sample boards, colour boards and other special reports.

#### **ADDENDA**

1. Addenda to Tender Documents are to be prepared, as required, by the Consultant and submitted to the PCA Representative, then forwarded to Contracting Authority.
2. Addenda to Tender Documents are issued through the Contracting Authority to GETS.
3. The Contracting Authority will issue all addenda in writing (no information is to be issued orally) and may issue an addendum if necessary.

4. Normally, addenda are issued no later than seven working days before the tenders close.

## **TENDER OPENING**

Tenders are opened at the location stated in the advertisement.

## **RE-WORK**

1. Consultant shall revise or amend the Construction Documents to bring the cost of the work within the limits stipulated.
2. Consultant is not entitled to additional fee for this service.

## **3.8. CONSTRUCTION ADMINISTRATION SERVICES**

### **GENERAL**

The Consultant shall:

1. Monitor the progress of the Contractor's work, compliance with all drawings and specifications, time schedules, quality standards and prepare progress reports on a weekly basis, through site reviews during the construction period.
2. Review of all submittal documents required of the contractor as per the specifications.
3. Review reports on Health and Safety strategies for construction stage of work.
4. Notify the PCA Representative immediately if Human Remains, Archaeological Remains and Items of Historical or Scientific Interest are discovered on the site and obtain further information on action to be taken.
5. Review and process shop drawings.
6. Prepare and provide to the PCA Representative, detailed drawings, clarification advice, Site Instructions, Contemplated Change Orders and Change Orders and other related Consultant input documents.
7. Reply to Requests for Information from the Construction Contractor via the PCA Representative.
8. Observe quality assurance testing, review and accept test reports.
9. Report on Contractors maintaining specified quality and schedules, ensuring that Contractors are monitoring delivery of critical materials and equipment.
10. Review and make recommendations on progress claims.
11. Issue interim and final deficiency reports.
12. Finalize project documentation and accounts.
13. Ensure compliance with Commissioning Plan.
14. Recommend the release of holdback upon satisfactory completion.
15. Issue interim and final certifications.
16. Review and accept Operation and Maintenance Manuals, including review with PCA operations & maintenance staff.
17. Follow-up on any problems identified during the warranty period.
18. Consultant is responsible for Quality control and quality insurance during site supervision.

## **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 and/or Provincial/Territorial Regulations - whichever is more restrictive.
2. Ensure the Contractor is mandated to provide all required coordination, isolation, protection and reinstatement of the fire protection and suppression systems throughout construction.

## **PROJECT MEETINGS**

The PCA Representative will arrange meetings every two weeks or as deemed suitable, throughout the entire construction period, for representatives from:

- PCA in-house staff;
  - Prime Consultant;
  - Prime Consultant's Sub-Consultants and Specialist Consultants as applicable as determined by PCA Representative;
  - Contractor and their Consultants and Sub-Contractors as applicable.
1. The Consultant shall include in the specifications and drawings, for provision by the Contractor, requirements for a heated meeting room of sufficient size, appropriate furniture and equipment to hold Project Meetings.
  2. The Consultant shall record the issues and decisions and prepare and distribute minutes to all attendees within two (2) working days of the meeting.
  3. The Prime Consultant and any proposed Sub/Specialist Consultants should be personally available to attend all construction meetings and respond to enquiries within one (1) working day of the PCA Representative's request, in the locality of the place of the work, from the date of the award of the Consultant agreement, until final inspection and turnover.
  4. Review minutes for errors in fact, omissions or other discrepancies and report to the PCA Representative.

## **PROJECT SCHEDULE**

1. Immediately upon receipt of the Project Schedule from the Contractor following the Contract award, review and verify whether the schedule is reasonable and has all detailed components of work shown separately.
2. Provide review comments and advice to the PCA Representative prior to the Consultant approving the Project Schedule.
3. Use the Project Schedule as the basis for monitoring and evaluating the progress of the work.
4. Assist the Contractor to avoid delays by providing timely reports and advice.
5. Keep accurate records of delay causes.
6. Record all discrepancies and recommend remedial measures to the PCA Representative.
7. Any request for Time Extensions shall be submitted to the PCA Representative who will forward to the Contracting Officer. Only the Contracting Officer may approve any request for Time Extensions.

## **BUDGET/FORECAST/CASH FLOW**

- .1 Review the value of progress of work against the approved cost breakdown. When each trade is regularly reviewed against the Project Schedule and the cost breakdown, it quickly becomes apparent whether the Contractor is on budget and is generating the appropriate cash flow for the work.
- .2 Record all discrepancies and agreed-upon remedial measures.
- .3 Provide project financial planning/advice to the PCA Representative, including funding commitment for the project according to government fiscal year.

## **SHOP DRAWINGS**

1. Review and process shop drawings in a timely manner.
2. Monitor and record the progress of shop drawing review. Record parties designated for action and follow up.
3. Verify the required shop drawing copy numbers. Consider additional copies for others such as Fire Protection/Prevention Engineer's office and Permit Officer.
4. Shop drawings shall be stamped: "Checked and Certified Correct for Construction" by the Contractor and stamped "reviewed" by the Consultant before return to the Contractor.
5. Provide one shop drawing package.
6. On completion of the building, include final shop drawings in the Operating and Maintenance Manuals. Provide one package. Verify that shop drawings are recorded in sequence and clearly identify the project number, building number and building address.

## **CLARIFICATIONS DURING CONSTRUCTION**

- .1 The Consultant must provide clarifications or requests for information on Drawings and Specifications or site conditions, as required in order that the project not be delayed.
- .2 Record Contractor's acknowledgment of receipt of all clarifications.
- .3 Verify and record whether an impact on cost or schedule may be expected and advise the PCA Representative.
- .4 Provide to the PCA Representative any additional detailed drawings, as and when required, to properly clarify or interpret the Contract documents, in a

timely manner.

## **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 a Contemplated Change Notice is to be issued based on Unit Prices, keep accurate account of the work. Record relevant dimensions and quantities.

## **INSPECTIONS AND SITE REVIEW**

- .1 Provide construction inspection services by qualified personnel to verify compliance with Contract documents. These personnel must be fully knowledgeable of the project's technical and administrative requirements.
- .2 It is required that fully qualified, experienced Inspection and site review personnel play a major role in the inspection and monitoring of the Work in detail.
- .3 Establish a written understanding with Contractors as to what stages or aspects of the work are to be inspected prior to being covered up.
- .4 Immediately after the Construction contract is awarded and before Work begins onsite, the Consultant shall attend, prepare an agenda, lead and take minutes of the pre- construction meeting.
- .5 Assess quality of work and identify in writing to the PCA Representative, all defects and deficiencies observed at time of inspections.
- .6 Inspect materials and prefabricated assemblies and components at their source or assembly plant as necessary for the progress of the project.
- .7 Any recommendations, clarifications or deficiency lists shall be issued in writing to the PCA Representative with a copy to the Contractor.
- .8 Keep the PCA Representative 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 reviews.
- .9 The Contractor is responsible for recording any and all changes from the original Contract on a marked-up hard copy of drawings and then at the end of the project shall check and verify the changes with the Sub-Contractors and after that forward to the Consultant. The Consultant is responsible for updating the drawing files and to provide electronic versions of the as-built Drawings and Specifications.
- .10 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, the Consultant shall safeguard the interests of PCA. The Consultant shall give immediate written notice to the PCA Representative and to the Contractor of the possible hazard. The Consultant shall, if necessary, stop the work to protect the safety of the public, the workers or Crown property or give orders for remedial work and contact the PCA Representative immediately for further instruction.
- .11 The Consultant shall not authorize deviations from the Contract documents; enter into the area of the responsibility of the Contractor's Field Superintendent; stop the work unless convinced that an emergency exists as noted above; authorize any payments.
- .12 Safety codes review will be performed regularly by the Safety Codes Officer with a report for each site visit.

## **CONSTRUCTION CHANGES**

- .1 The Consultant does NOT have authority to change the scope of work or the price of the Contract. Approved Change Orders must be issued to cover all changes, including those not affecting the cost of the project, such as schedule, substitutions, etc.
- .2 The Consultant must prepare Contemplated Change Notices (CCNs) and review quotations associated with Change Orders (COs). This includes monitoring and recording the progress of CCNs and COs. Where work must proceed pending issue of a Change Order, the Consultant must record time and materials expended.
- .3 Proposed changes that affect cost or design or otherwise alter the terms of the Contract must be accepted and approved by the PCA Representative to process. Upon approval from the PCA Representative, quotations must be obtained from the contractor in detail. Prices are then reviewed and recommendations forwarded to the PCA Representative. The PCA Representative will then forward the CCN to the Contracting Authority to issue the COs to the Contractor, with a copy to Consultant. The practice of 'tradeoffs' is not allowed.

## **CONTRACTOR'S PROGRESS PAYMENTS**

- .1 Each month, the Contractor will submit a progress claim for work and materials delivered to site as required in their Contract. The claims are made by completing the following forms where applicable:
  - Request for Construction Payment with supporting invoices/documents in government format;
  - Cost Breakdown for Unit and/or combined Price Contract;
  - Cost Breakdown for Fixed Price Contract;
  - Statutory Declaration: Progress Claim; and
  - Workers' Compensation Board clearance letter.
- .2 The Consultant must determine the amounts owing to the Contractor based on the progress of the work and certify payments to the Contractor.
- .3 The Consultant must review and sign designated government forms and promptly forward claims to the PCA Representative for processing. Obtain the following information from the Contractor and submit with each progress claim:
  - Updated schedule of the progress of work.

## **PAYMENT FOR MATERIALS ON SITE**

- .1 The Contractor may claim for payment of material onsite, but not yet incorporated in the work.
- .2 Material must be stored in a secure place and protected from weather as designated by the PCA Representative.
- .3 A detailed list, checked and verified by the Consultant, of materials with supplier's invoice showing price of each item must accompany each claim.
- .4 Items must be listed separately on the Detail Sheet showing the breakdown and total.

## **TESTING**

- .1 Prior to tender the Consultant must provide the PCA Representative with a

- recommended list of tests to be undertaken, including onsite and factory testing. Specify what items are to be tested in the specifications.
- .2 Prepare a list of allowances for the tests in the specifications and provide a detailed breakdown of the types of testing and amount.
  - .3 The Consultant shall propose a testing agency to PCA Representative for approval prior to arranging the testing agency's services. The Consultant shall arrange testing, distribute test reports and coordinate with Contractor and all parties concerned.
  - .4 The Consultant must review all test reports and take necessary action with Contractor when work fails to comply with contract requirements. The PCA Representative must be immediately notified when tests fail to meet project requirements and when corrective work will affect the schedule.

### **PROTOTYPES, MOCKUPS AND SAMPLE INSTALLATIONS**

1. Specify explicitly the need for prototypes, mockups and sample installations to gain installation knowledge for specialized testing of technically advanced assemblies.
2. Ensure that specifications are very clear on full requirements for such prototype work including:
  - Specifying timeframes and weather conditions under which this work will be carried out.
  - Noting area on site plan where this is to be done.
  - Bringing this item to the attention of the Contractor at construction start meeting and approve their methodologies and time frames for such work.
  - Involving all necessary consulting disciplines, trades, suppliers, product manufacturers, testing agencies, Authorities, for a comprehensive review of the requirements and scheduled installation.
  - Noting where necessary all requirements for submitting shop drawings, product information and samples well in advance, so as not to disrupt project work schedule.
  - Ensure sufficient observation reports, photos or videos of work undertaken are available to avoid misunderstandings at a later stage.

### **SUBSTANTIAL COMPLETION**

1. The Contractor shall propose the site review when the project is at Interim Completion stage and provide a list of deficiencies prior to the site review. Commissioning must be completed and the Commissioning Report reviewed and accepted by the Consultants and PCA Representative.
2. The Contractor shall arrange for an Interim (substantial) Site Review with the PCA Representative, PCA representatives, stakeholders, Consultants and major sub-Contractors for the site review.
3. Consultants will prepare an Interim Completion report and a list of deficiencies. Upon reviewing the report, confirm that the work complies with Contract requirements and confirm the value of remaining work. Consultants will recommend the acceptance of Interim Completion by signing the Interim Certificate.
4. When PCA is also satisfied that the construction work is substantially complete and the project is fit for use as intended, the PCA Representative will also co-sign and issue the Interim Certificate of Completion to the Contractor, provided that the work remaining to be done under the contract is, in the opinion of the PCA Representative, possible to complete or correct at a cost of not more than:

- 3% of the first \$500,000, and
- 2% of the next \$500,000, and
- 1% of the balance of the value of the contract at the time this cost is calculated.

Payment to Contractor requires that all concerned parties complete and sign the following documents:

- .1 Interim Certificate of Completion (Government form);
- .2 Interim Site Review report and Acceptance;
- .3 Progress Claim including holdback amount;
- .4 Cost Breakdown for the Fixed Price Contract and the cost for the remaining work;
- .5 Cost Breakdown for Unit and/or Combined Price Contract;
- .6 Project Schedule for the remaining work;
- .7 Statutory Declaration for Interim Certificate of Completion; and
- .8 Workers' Compensation Board Clearance Certificate.

The Consultant must verify that all items are correctly stated and ensure that completed documents and any supporting invoices/documents are given to the PCA Representative for processing.

#### **FINAL COMPLETION**

- .1 The Contractor shall inform PCA Representative when satisfied that all work under the Contract has been completed, including all deficiency items listed during the Interim Inspection.
- .2 Safety Codes Officer will perform a final inspection site review. A final report will be issued by the Safety Codes Officer to state that the project is completed as per construction documentation which complies with the codes.
- .3 Contractor shall apply for and obtain Occupancy Permit issued by the Authority Having Jurisdiction prior to the Final Site Review.
- .4 The Contractor shall arrange for the Final Site Review with the PCA Representative(s), stakeholders, Consultants and major sub-Contractors.
- .5 If the Work complies with Contract requirements and is satisfactory, upon recommendation from the Consultant, the PCA Acceptance Board will accept completion of the project.
- .7 The Consultant must verify that all items are correctly stated and ensure that completed documents and any supporting invoices/documents are given to the PCA Representative for processing.
- .8 The Consultant shall continue to monitor the situation and communicate with the PCA Representative to ensure that they are aware of any deficiency work being delayed beyond reasonable timeframes.
- .9 The Consultant shall submit the required documents and obtain the Passive House Plus certificate, when applicable.

#### **RECORD (AS-BUILT) DRAWINGS AND SPECIFICATIONS**

- .1 The Consultant shall provide as-built documentation to all new buildings, landscapes, exhibits and sites that are changed by the project work.
- .2 The Consultant must produce for all parts of the construction as-built drawings of areas that show deviations in construction from the original drawings, including as-built information, changes shown on Post-Contract Drawings, changes resulting from Change Orders or from onsite instructions.
- .3 The Consultant shall include final survey drawing and Real Property Report in

- the as-built record.
- .4 The Consultant shall check and verify all as-built records for completeness and accuracy prior to submitting to the PCA Representative.
  - .5 The Consultant shall submit Record Drawings and Specifications for each building within three (3) weeks of Final Completion acceptance. Electronic versions are required for both Drawings and Specifications and also in both original and PDF formats.

## **OPERATION AND MAINTENANCE MANUALS**

- .1 The Contractor shall submit Operation and Maintenance Manuals for the construction to the PCA Representative for review and acceptance prior to Interim Completion, with the exception of scheduled work.
- .2 For the construction, the Contractor shall submit four (4) duplicate hard copies and two (2) duplicate digital copies of the Operation and Maintenance Manuals to PCA Representative within three (3) weeks of Final Completion acceptance. The Operation and Maintenance Manuals shall be presented as follows:
  - a. Print project name, project number, project address, building number, Contractor's name and contact information on all pages.
  - b. Organize by 3-ring binders and separate by color dividers by specification sections.
  - c. Include a complete set of as-built Drawings and Specifications.
  - d. Include a copy of the Real Property Report, signed and sealed by the Canadian Surveyor.
  - e. Include a copy of Commissioning Report.
  - f. Include a copy of all products, materials, equipment and fixtures - product information (name and contact information of sub-trade, supplier and manufacturer, etc.), test/approval information, operating instructions and maintenance information/schedule, spare parts, certificates, warranty and site- specific final shop drawings etc.

## **3.9. POST CONSTRUCTION SERVICES**

### **GENERAL**

- .1 All work under the Construction Contract carries a standard twelve (12) month warranty commencing on the effective date of the issuing of Interim Certificate of Completion. Certain parts of the work, such as roofing, structure, joints and bearings, window and exterior door(s), building envelope, landscaping and distribution systems may have extended warranties as specified.
- .2 Roofing warranty is minimum 30 years and extended to the same warranty period as the specified roofing product being used.
- .3 Window and exterior door warranties are minimum 10 years and extended to the same warranty period as the specified product being used.
- .4 Building structure, joints and bearings warranties are minimum 10 years.
- .5 Other than roofing, window and exterior door(s) as specified, remaining building envelope components warranties are minimum 5 years.
- .6 Landscaping warranty is extended to 2 full growing seasons.
- .7 Distribution systems (mechanical and electrical systems) warranties are minimum 2 years.
- .8 New buildings shall meet and exceed all the requirements to satisfy the

- warranty program and coverage.
- .9 The Contractor is responsible for correcting and/or replacing all defects in the work during the warranty period, except for damage caused by misuse, abuse or neglect by others.
  - .10 The PCA Representative will promptly notify the Consultant in the event that defects or alleged defects appear in the work of the Contractor.
  - .11 The Consultant shall investigate all defects and alleged defects in the work promptly and issue appropriate information and advice to the PCA Representative.
  - .12 The Consultant shall arrange a lesson-learned meeting with the Contractor, PCA Representative and stakeholders within four (4) weeks of Final Completion. Consultant shall provide information, advice, improvement, suggestions, constructive inputs and lessons learned for the benefit of future projects.

### **TEN-MONTH WARRANTY INSPECTION**

Nine months after Interim Completion acceptance, the Consultant shall:

- .1 Arrange a ten-month warranty site review with the PCA Representative, Consultant and any sub-Consultants, Contractor, any mechanical and electrical sub-Contractors, stakeholders and PCA Maintenance staff.
- .2 Prepare deficiency list with the PCA Representative for the Contractor's correction/adjustment prior to the site review and distribute to the site review participants.
- .3 Update the deficiency list during the site review and distribute to the site review participants.
- .4 Inform the PCA Representative in writing when all items listed on the ten-month Warranty Inspection report have been completed satisfactorily.

## **3.10. PROJECT ADMINISTRATION**

### **PROJECT MANAGEMENT**

- .1 The PCA Representative assigned to the project is the PCA Project Manager unless noted otherwise.
- .2 The PCA Representative is directly concerned with the project and is responsible for its progress. The PCA Representative is the liaison officer with the Consultant, PCA, stakeholders and Contractor.
- .3 Unless stated otherwise by the PCA Representative, the Consultant will obtain all Federal and Provincial/Territorial requirements, permits and approvals necessary for the work.

### **LINES OF COMMUNICATION**

- .1 Unless otherwise requested by the PCA Representative, the Consultant shall communicate with the PCA Representative only.

### **MEDIA**

The Consultant shall not respond to requests for project-related information or questions from the media. Such enquiries are to be directed to the PCA

Representative.

## **GENERAL DELIVERABLES**

Where deliverables and submissions include summaries, reports, drawings, plans, specifications and schedules, one (1) copy shall be provided to the PCA Representative in electronic PDF format; original format and hard copies may be required as requested.

Deliverable submissions including, but are not limited to the following:

<b>Document</b>	<b>Deliverable format</b>
Written reports and	Microsoft Word, Excel &
Spreadsheets and	Microsoft Word, Excel &
Presentations:	Microsoft Word, Excel &
Schedules:	Adobe PDF
Drawings:	AutoCAD and Adobe PDF
Specifications:	NMS Editable
Exhibit/Interpretive	Adobe Creative Suite CS6 or higher and PDF and EPS
Web:	Adobe PDF
Internet:	HTML, Macromedia Flash

Final drawings at any stage and record drawings must be in AutoCAD and PDF formats.

All drawings will be generated and distributed in the format using layering and file transfer protocols as prescribed in Standards and Procedures of the Doing Business with PWGSC document.

## **ACCEPTANCE OF CONSULTANT DELIVERABLES**

- .1 While the PCA Representative acknowledges the Consultant's obligations to meet project requirements, the project delivery process entitles the PCA Representative to review the Consultant's work.
- .2 The PCA Representative reserves the right to reject the Consultant's undesirable or unsatisfactory work.
- .3 Acceptances indicate that, based on a general review of material for specific issues, the material is considered to comply with governmental and PCA objectives and practices and that overall project objectives should be satisfied. The acceptance does not relieve the Consultant of professional responsibility for the project and compliance with the terms and conditions of the Contract.
- .4 PCA Representative acceptances do not prohibit rejection of work which is determined to be unsatisfactory at later stages of review. If progressive design development or technical investigation reveals that earlier acceptances should be withdrawn, the Consultant is responsible for redesigning work and resubmitting for acceptance at the Consultant's cost.

## **COORDINATION WITH SUB-CONSULTANTS**

The Consultant shall:

- .1 Throughout all phases of the project, assume responsibility for coordinating

- the work of any sub-Consultants and specialists retained by the Consultant and the Exhibit Designer.)
- .2 Ensure clear, accurate and ongoing communication of design concept, budget, scheduling issues (including changes) and all project information is provided to the sub-Consultants and specialists in a timely manner.
  - .3 Coordinate input for the PCA Representative's Risk Management Plan.
  - .4 Coordinate the Quality Assurance process ensuring submissions of sub-Consultants and specialists are complete and signed-off by the designated senior reviewer. Prime consultant is responsible for the work of their sub-consultants.
  - .5 Ensure sub-Consultants and specialists provide adequate site review services at critical times. Attend all required meetings and attend site meetings when they coincide with site reviews.

### **PROJECT RESPONSE TIME**

Key personnel of the Consultant and any sub-Consultants or specialist firms must be personally available to attend meetings or respond to enquiries within one (1) working day.

### **QUALITY ASSURANCE / VALUE FOR MONEY REVIEWS**

- .1 In concert with the Integrated Design process, the PCA Representative will conduct Value Architecture/Engineering for Money/Quality Assurance reviews on design and construction documents prepared by the Consultants. Consultants and any sub- Consultants must respond in writing to the PCA Representative's comments in a timely manner and will be held accountable for delays if proper and timely responses do not occur.
- .2 PCA Representative reviews are not intended as a check against errors or omissions contained within the documents submitted. Consultants are responsible for checking and correcting any such errors or omissions prior to submission and regardless of any review comments by the PCA Representative.

### **OTHER AUTHORITIES HAVING JURISDICTION**

- .1 The Safety Codes Officer in this case is not the Authority Having Jurisdiction. The Safety Codes Officer is providing services as a code expert to the prime Consultant. Thus he is responsible and liable to the codes compliance requirements.
- .2 Although the Federal Government does not formally recognize jurisdictions at other levels of government, voluntary compliance with the requirements of these other levels of government is a requirement.
- .3 Codes, regulations, bylaws and decisions of Authorities Having Jurisdiction will be observed. In cases of conflicts, the most stringent will apply.
- .4 PCA will voluntarily comply with the applicable provincial/territorial Occupational Health and Safety Acts and Regulations, in addition to the related Canada Occupational Safety and Health Acts and Regulations.
- .5 The Consultant shall utilize the latest editions of the applicable codes, standards, 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. The Consultant shall identify all jurisdictions appropriate to the project. In this project we identified these codes and regulations but the

Consultant has the option of consulting other regulations, standards, codes and references as deemed necessary to complete the work.

## **4. PCA INTERNAL PROCESS**

### **4.1. FEDERAL PROJECT TEAM PARTICIPANTS**

The Federal Project Team includes:

- .1 Project Leader who represents the Owner (PCA), identifies requirements and initiates projects, develops requirements in both functional and operational terms, obtains approvals and funding and participates in the selection of Consultants.
- .2 PCA Representative who is assigned by the Project Leader and is responsible for the day-to-day management of the project. The PCA Representative will be the Consultant's single point of contact for all project requests.
- .3 Other PCA personnel. Numerous PCA parties may be involved in the project. These representatives will be responsible for functional issues on the project, related to their respective organizations.

### **PCA DESIGN REVIEW COMMITTEE**

- .1 The purpose of the review and approval process is to ensure compliance with the project program, adherence to good design practice and technical quality assurance.
- .2 The PCA Representative will schedule review sessions by the committee at the completion of the Pre-Design, Schematic Design, Design Development and 99% of the Construction Documentation stages.

## **5. HEALTH AND SAFETY**

- .1 The Consultant shall abide by the current Occupational Health and Safety Act and Regulations and Environmental Acts and Regulations. Including the following:
  - .2 Develop written Site-Specific Health and Safety Plan (SSHSP) based on hazard assessment prior to beginning any field work and continue to implement, maintain, and enforce plan through all required services of the project.
  - .3 The SSHSP needs to cover all activity of the Consultant team (Consultant personnel, sub-Consultant and contractors).
  - .4 The Consultant shall incorporate in his SSHSP and abide by any additional constraint or safety requirement imposed by PCA for accessing and using the leased property or part thereof.
  - .5 Coordinate field work with PCA for any activity on or adjacent to the project site.
  - .6 Provide all required Personnel Protective Equipment, equipment and material

as required to meet the intent of the safety requirement set in the SSHSP or as required by the Provincial Occupational Health and Safety Legislation.

- .7 The Consultant shall be responsible for health and safety for all of their team on site, and for protection of general public and government employees adjacent to the site to the extent that they may be affected by conduct of any fieldwork.
- .8 Assign responsibility and obligation to a Competent Person or Supervisor to oversee the field work. At the Competent Person's discretion, the field work may be stopped if necessary or advisable for reasons of health or safety. The Departmental Representative may also stop work for health and safety considerations.
- .9 Daily tailboard meetings are required at the project site. Records of tailboard meetings are to be submitted to the Departmental Representative on a daily basis.

## **SUBMITTALS**

- .1 Submit a Site-Specific Health and Safety Plan: Within 5 days after date of Notice to Proceed and prior to commencement of field work. Health and Safety Plan must include:
  - .2 Results of site specific safety hazard assessment.
  - .3 Mitigation and precaution measures that will be implemented as a result of a safety and health risk or a hazard analysis for site tasks and operations.
  - .4 Consultant's Team Safety Communication Plan.
  - .5 Contingency and Emergency Response Plan addressing standard operating procedures specific to the project site to be implemented during emergency situations.
- .6 In addition to the SSHSP the following documents shall also be submitted:
  - .7 A copy of the Consultant Team WSIB Clearance Certificates.
  - .8 Occupational health and safety training and certification records: the Consultant must provide documentation verifying all members of the Consultant team have received the appropriate safety training including equipment operation training as required to perform the specific field work.
- .9 Departmental Representative may respond in writing, either accepting or requesting improvements, where deficiencies or concerns are noted and may request resubmission with correction of deficiencies or concerns.
- .10 Departmental Representative's review of Consultant's final SSHSP should not be construed as approval and does not reduce the Consultant's overall responsibility for construction Health and Safety at

the projectsite.

### **SITE ACCESS**

- .1 Site access prior to construction will need to be coordinated through the PCA Departmental Representative who will request access via Facility Manager upon receipt of 1 week' notice for the site visit.
- .2 Site access is available during normal work hours of the Contractor which are Monday to Friday from 8h30 to 4h30 to unless otherwise indicated.



## Doing Business with PWGSC

# Documentation and Deliverables Manual



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# 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

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## Revisions

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

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# **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.

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## 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.

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## 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.

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### 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).

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## 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.

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### 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.

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## 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
<b>TOTAL ESTIMATED AMOUNT</b>						

## 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,

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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

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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).

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## **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

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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.

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## 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

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#### **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>			
1a The index shows a complete listing of drawing titles and numbers.			
<b>2 Title Blocks</b>			
2a The title block is as per the <i>PWGSC National CADD Standard</i> .			
<b>3 Units</b>			
3a All units of measure are metric.			
<b>4 Trade Names</b>			
4a Trade names are not used.			
<b>5 Specification Notes</b>			
5a There are no specification-type notes.			
<b>6 Terminology</b>			
6a The term "Departmental Representative" is used instead of "Engineer," "PWGSC," "Owner," "Consultant," or "Architect."			
6b 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>			
7a The project quantities, configurations, dimensions, and construction details are included.			
7b 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: \_\_\_\_\_

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## Appendix B Drawings and Specifications Table of Contents Template

### B.1 General

List all drawings by number and title.

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

### B.2 Sample Table of Contents

---

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

---

#### DRAWINGS:

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

#### SPECIFICATIONS:

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

---

## Appendix C Addenda Formatting Template

### C.1 Instructions

To re-issue a drawing with an addendum:

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

To re-issue a specification with an addendum:

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

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

### C.2 Sample Addendum

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

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

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

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

#### **DRAWINGS:**

- 1 A1 Architecture  
.1

#### **SPECIFICATIONS:**

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

---

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

### D.1 Electronic Submissions

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

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

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

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

### D.2 Directory Structure

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

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

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

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

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

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

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

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

---

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

## - Y

Where:

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

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

For the “Drawings - Dessins” folder:

## = Y - Z

Where:

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

Y = the English title of the folder

Z = the French title of the folder

Example:

04 - Electrical – Électrique

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

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

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

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

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

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

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

## - Y

Where:

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

Y = the title of the folder

Example:

---

## 02 – Divisions

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

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

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

---

## D.2.6 Directory Structure Example

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

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

## D.3 Naming Convention for PDF Files

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

### D.3.1 Drawing File Names

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

X### - Y

Where:

---

X = the letter or letters from the drawing title block (“A” for Architecture or “ID” for Interior Design for example) associated with the discipline

### = the drawing number from the drawing title block (one to three digits)

Y = the drawing name from the drawing title block (for bilingual drawings, the name in both English and French is to appear).

Example:

A001 - First Floor Details

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

The following important points about drawings are to be noted:

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

### D.3.2 Specifications

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

### D.3.3 Documents Other Than Specifications Divisions

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

## - Y

Where:

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

Y = Name of the document

Example:

01 – Drawings and Specifications Index

---

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

The specifications divisions must be named as follows:

Division ## - Y

Where:

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

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

Example:

Division 05 – Metals

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

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

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

Project Number / Numéro de projet

Project Title / Titre du projet

Documents for Tender / Documents pour appel d'offres

Disk X of/de X

Example:

Project 123456 / Projet 123456

Repair Alexandra Bridge / Réparation du pont Alexandra

Documents for Tender / Documents pour appel d'offres

Disk 1 of/de 1



**SECURITY REQUIREMENTS CHECK LIST (SRCL)  
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)**

**PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE**

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine: **Parks Canada**  
 2. Branch or Directorate / Direction générale ou Direction: **Parks Canada - Northern Ontario**

3. a) Subcontract Number / Numéro du contrat de sous-traitance  
 3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant

4. Brief Description of Work / Brève description du travail  
**Consulting services for the pre-design, design, tender, construction supervision, closure documentation for a structure.**

5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées?  No / Non  Yes / Oui

5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?  No / Non  Yes / Oui

6. Indicate the type of access required / Indiquer le type d'accès requis

6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) / (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)  No / Non  Yes / Oui

6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.  No / Non  Yes / Oui

6. c) Is this a commercial courier or delivery requirement with no overnight storage? / S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?  No / Non  Yes / Oui

7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès

Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
--	--------------------------------------	---

7. b) Release restrictions / Restrictions relatives à la diffusion

No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/> Not releasable / À ne pas diffuser <input type="checkbox"/> Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/> Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/> Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:
--	--	--

7. c) Level of information / Niveau d'information

PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/> PROTECTED B / PROTÉGÉ B <input type="checkbox"/> PROTECTED C / PROTÉGÉ C <input type="checkbox"/> CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/> SECRET / SECRET <input type="checkbox"/> TOP SECRET / TRÈS SECRET <input type="checkbox"/> TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>	NATO UNCLASSIFIED <input type="checkbox"/> NATO NON CLASSIFIÉ <input type="checkbox"/> NATO RESTRICTED <input type="checkbox"/> NATO DIFFUSION RESTREINTE <input type="checkbox"/> NATO CONFIDENTIAL <input type="checkbox"/> NATO CONFIDENTIEL <input type="checkbox"/> NATO SECRET <input type="checkbox"/> NATO SECRET <input type="checkbox"/> COSMIC TOP SECRET <input type="checkbox"/> COSMIC TRÈS SECRET <input type="checkbox"/>	PROTECTED A <input type="checkbox"/> PROTÉGÉ A <input type="checkbox"/> PROTECTED B <input type="checkbox"/> PROTÉGÉ B <input type="checkbox"/> PROTECTED C <input type="checkbox"/> PROTÉGÉ C <input type="checkbox"/> CONFIDENTIAL <input type="checkbox"/> CONFIDENTIEL <input type="checkbox"/> SECRET <input type="checkbox"/> SECRET <input type="checkbox"/> TOP SECRET <input type="checkbox"/> TRÈS SECRET <input type="checkbox"/> TOP SECRET (SIGINT) <input type="checkbox"/> TRÈS SECRET (SIGINT) <input type="checkbox"/>
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**PART A (continued) / PARTIE A (suite)**

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?  
 Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?  No / Non  Yes / Oui  
 If Yes, indicate the level of sensitivity:  
 Dans l'affirmative, indiquer le niveau de sensibilité :

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

Short Title(s) of material / Titre(s) abrégé(s) du matériel :  
 Document Number / Numéro du document :

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

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

- |   |   |   |  |
|---|---|---|--|
| <input checked="" type="checkbox"/> RELIABILITY STATUS<br>COTE DE FIABILITÉ | <input type="checkbox"/> CONFIDENTIAL<br>CONFIDENTIEL           | <input type="checkbox"/> SECRET<br>SECRET           | <input type="checkbox"/> TOP SECRET<br>TRÈS SECRET               |
| <input type="checkbox"/> TOP SECRET- SIGINT<br>TRÈS SECRET - SIGINT         | <input type="checkbox"/> NATO CONFIDENTIAL<br>NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET<br>NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET<br>COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS<br>ACCÈS AUX EMPLACEMENTS              |   |   |  |

Special comments:  
 Commentaires spéciaux : \_\_\_\_\_

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.  
 REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?  
 Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?  No / Non  Yes / Oui  
 If Yes, will unscreened personnel be escorted?  
 Dans l'affirmative, le personnel en question sera-t-il escorté?  No / Non  Yes / Oui

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

**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

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

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

**PRODUCTION**

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

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

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

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



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

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

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

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

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

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

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

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

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

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

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



**PART D - AUTHORIZATION / PARTIE D - AUTORISATION**

13. Organization Project Authority / Chargé de projet de l'organisme

Name (print) - Nom (en lettres moulées) <b>Maguy Eustache</b>	Title - Titre <b>Project Manager</b>	Signature <i>Maguy Eustache</i>
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Telephone No. - N° de téléphone 819-420-9615	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel maguy.eustache@canada.ca	Date 02-04-2019
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14. Organization Security Authority / Responsable de la sécurité de l'organisme

Name (print) - Nom (en lettres moulées) <b>Daniel Deschênes</b>	Title - Titre <b>Security Administrator</b>	Signature <i>Daniel Deschênes</i>
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Telephone No. - N° de téléphone 819-420-9522	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel daniel.deschenes2@canada.ca	Date 2019-04-02
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15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?  
Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

No / Non     Yes / Oui

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)	Title - Titre	Signature
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Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
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17. Contracting Security Authority / Autorité contractante en matière de sécurité

Name (print) - Nom (en lettres moulées) <b>Paul Lepinski</b>	Title - Titre <b>Contract Security Officer</b>	Signature
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Telephone Téléphone : 613 957-1294   paul.lepinski@tpsgc-pwgs.gc.ca	E-mail address - Adresse courriel	Date
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