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REQUEST FOR STANDING OFFER (RFSO)

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SUPPLEMENTARY INSTRUCTIONS TO PROPONENTS (SI)

SI 1 INTEGRITY PROVISIONS – DECLARATION OF CONVICTED OFFENCES

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

SI 2 FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY - CERTIFICATION

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

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

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

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

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GENERAL INSTRUCTIONS TO PROPONENTS

Integrity Provisions – Proposal

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

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

GI 1 DEFINITION

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

"Applicable Taxes":

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

"Consultant Team":

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

"Key Personnel":

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

"Price Rating":

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

"Proponent":

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

"PWGSC Evaluation Board":

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

"Technical Rating":

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

GI 2 INTRODUCTION

1. Public Works and Government Services Canada (PWGSC) is inviting consulting firms with Environmental and Geotechnical Engineering expertise to submit proposals for Standing Offers. The selected consultants shall provide a range of services as identified in the Required Services section of this document for projects in the National Capital Area.

2. Proponents shall be licensed or eligible to be licensed to practise in the province of Quebec or Ontario. If a Proponent is licensed to practise in only one of the two provinces, then that Proponent must be eligible and willing to be licensed in the province in which they are not licensed. Firms should be able to demonstrate successful delivery of these services for a broad variety of projects over the last five (5) years. In general, the firm and its personnel will be evaluated on the basis of their demonstrated understanding of the scope of services, their approach and methodology to providing those services, the quality of their relevant experience in this area, as well as the cost of the provision of the services.
3. It is PWGSC's intention to authorize up to four Standing Offers, each for a period of 4 years from the date of issuing the Standing Offers. The total dollar value of all Standing Offers is estimated to be \$10,000,000.00 (Applicable Taxes included). Individual call-ups will vary, up to a maximum of \$1,500,000.00 (Applicable Taxes included). Proponents should note that there is no guarantee that the full or any amount of the Standing Offers will be called-up; PWGSC will issue call-ups only when the specific services to be provided under the Standing Offer are needed. Please refer to Section SP5, CALL-UP PROCEDURE.
4. This procurement is subject to the provisions of the North American Free Trade Agreement (NAFTA), World Trade Organization - Agreement on Government Procurement (WTO-AGP), Canada-European Union Comprehensive Economic and Trade Agreement (CETA), Canadian Free Trade Agreement (CFTA).

GI 3 PROCUREMENT BUSINESS NUMBER

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

GI 4 CONTRACTING AUTHORITY AND DEPARTMENTAL REPRESENTATIVE

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

Public Works and Government Services Canada
Real Property Contracting Directorate
140 O'Connor
Ottawa, Ontario
K1A 0S5
2. The Contracting Authority is responsible for the establishment of the Standing Offer, its administration, and any contractual issues relating to individual call-ups.
3. A Departmental Representative will be identified at time of each individual Call-Up.
4. The Departmental Representative will be responsible for approval of all matters concerning the technical content of the work under the Call-Up.

GI 5 QUANTITY

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

GI 6 PWGSC OBLIGATION

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

GI 7 RESPONSIVE PROPOSALS

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

GI 8 COMMUNICATIONS - SOLICITATION PERIOD

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

GI 9 OVERVIEW OF SELECTION PROCESS

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

GI 10 SUBMISSION OF PROPOSAL

1. Canada requires that each proposal, at closing date and time or upon request from the Contracting Authority, be signed by the Proponent or by an authorized representative of the Proponent. If a proposal is submitted by a joint venture, it must be in accordance with section GI18.
2. It is the Proponent's responsibility to:

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

GI 11 NON-ACCEPTANCE OF ELECTRONICALLY TRANSMITTED PROPOSALS

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

GI 12 EVALUATION OF PRICE

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

GI 13 LIMITATION OF SUBMISSIONS

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

GI 14 LICENSING REQUIREMENTS

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

GI 15 REJECTION OF PROPOSAL

1. Canada may reject a proposal where any of the following circumstances is present:
 - (a) the Proponent has been declared ineligible for selection, following unsatisfactory performance in a previous project as determined in accordance with the department's performance review procedures;
 - (b) an employee, sub-consultant or specialist consultant included as part of the proposal has been declared ineligible, for selection for work with the department in accordance with the performance review procedure referred to in paragraph 1.(a), which would render the employee, sub-consultant or specialist consultant ineligible to bid on the requirement, or the portion of the requirement the employee, sub-consultant or specialist consultant is to perform;

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

GI 16 NOT APPLICABLE

GI 17 INSURANCE REQUIREMENTS

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

GI 18 JOINT VENTURE

- 1. A joint venture is an association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to bid together on a requirement. Proponents who bid as a joint venture must indicate clearly that it is a joint venture and provide the following information:
 - (a) the name of each member of the joint venture;
 - (b) the Procurement Business Number of each member of the joint venture;
 - (c) the name of the representative of the joint venture, i.e. the member chosen by the other members to act on their behalf, if applicable;
 - (d) the name of the joint venture, if applicable.

2. If the information is not clearly provided in the proposal, the Proponent must provide the information on request from the Contracting Authority.
3. The proposal and any resulting standing offer must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of all members of the joint venture. The Contracting Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the RFSO and any resulting standing offer. If a standing offer is issued to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of any contract resulting from a call-up against the standing offer.

GI 19 LATE SUBMISSIONS

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

GI 20 LEGAL CAPACITY

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

GI 21 DEBRIEFING

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

GI 22 FINANCIAL CAPABILITY

1. Financial Capability Requirement: The Proponent must have the financial capability to fulfill this requirement. To determine the Proponent's financial capability, the Contracting Authority may, by written notice to the Proponent, require the submission of some or all of the financial information detailed below during the evaluation of proposals. The Proponent must provide the following information to the Contracting Authority within fifteen (15) working days of the request or as specified by the Contracting Authority in the notice:
 - (a) Audited financial statements, if available, or the unaudited financial statements (prepared by the Proponent's outside accounting firm, if available, or prepared in-house if no external statements have been prepared) for the Proponent's last three fiscal years, or for the years that the Proponent has been in business if this is less than three years (including, as a minimum, the Balance Sheet, the Statement of Retained Earnings, the Income Statement and any notes to the statements);
 - (b) If the date of the financial statements in (a) above is more than five months before the date of the request for information by the Contracting Authority, the Proponent must also provide, unless this is prohibited by legislation for public companies, the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement), as of two months before the date on which the Contracting Authority requests this information;

- (c) If the Proponent has not been in business for at least one full fiscal year, the following must be provided:
 - (i) the opening Balance Sheet on commencement of business (in the case of a corporation, the date of incorporation);
 - (ii) the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement) as of two months before the date on which the Contracting Authority requests this information.
 - (d) A certification from the Chief Financial Officer or an authorized signing officer of the Proponent that the financial information provided is complete and accurate;
 - (e) A confirmation letter from all of the financial institution(s) that have provided short-term financing to the Proponent outlining the total of lines of credit granted to the Proponent and the amount of credit that remains available and not drawn upon as of one month prior to the date on which the Contracting Authority requests this information.
2. If the Proponent is a joint venture, the financial information required by the Contracting Authority must be provided by each member of the joint venture.
 3. If the Proponent is a subsidiary of another company, then any financial information in 1. (a) to (e) above required by the Contracting Authority must be provided by the ultimate parent company. Provision of parent company financial information does not by itself satisfy the requirement for the provision of the financial information of the Proponent, and the financial capability of a parent cannot be substituted for the financial capability of the Proponent itself unless an agreement by the parent company to sign a Parental Guarantee, as drawn up by Public Works and Government Services Canada (PWGSC), is provided with the required information.
 4. Financial Information Already Provided to PWGSC: The Proponent is not required to resubmit any financial information requested by the Contracting Authority that is already on file at PWGSC with the Contract Cost Analysis, Audit and Policy Directorate of the Policy, Risk, Integrity and Strategic Management Sector, provided that within the above-noted time frame:
 - (a) the Proponent identifies to the Contracting Authority in writing the specific information that is on file and the requirement for which this information was provided;
 - (b) the Proponent authorizes the use of the information for this requirement.

It is the Proponent's responsibility to confirm with the Contracting Authority that this information is still on file with PWGSC.
 5. Other Information: Canada reserves the right to request from the Proponent any other information that Canada requires to conduct a complete financial capability assessment of the Proponent.
 6. Confidentiality: If the Proponent provides the information required above to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as permitted by the Access to Information Act, R.S., 1985, c. A-1, Section 20(1) (b) and (c).
 7. Security: In determining the Proponent's financial capability to fulfill this requirement, Canada may consider any security the Proponent is capable of providing, at the Proponent's sole expense (for example, an irrevocable letter of credit from a registered financial institution drawn in favour of Canada, a performance guarantee from a third party or some other form of security, as determined by Canada).

8. In the event that a proposal is found to be non-compliant on the basis that the Proponent is considered NOT to be financially capable of performing the subject requirement, official notification shall be provided to the Proponent.

GI 23 REVISION OF PROPOSAL

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

GI 24 PERFORMANCE EVALUATION

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

GI 25 PROPOSAL COSTS

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

GI 26 CONFLICT OF INTEREST - UNFAIR ADVANTAGE

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

GI 27 LIMITATION OF LIABILITY

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

GI 28 STATUS AND AVAILABILITY OF RESOURCES

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

GI 29 CODE OF CONDUCT FOR PROCUREMENT – PROPOSAL

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

STANDING OFFER PARTICULARS (SP)

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

STANDING OFFER PARTICULARS

SP 1 GENERAL

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

SP 2 WITHDRAWAL/REVISION

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

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

SP 3 PERIOD OF THE STANDING OFFER

The period for placing call-ups against the Standing Offer shall be for **four** years commencing from the start date identified on the Standing Offer.

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

SP 4 CALL-UP LIMITATION

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

SP 5 CALL-UP PROCEDURE

1. Services will be called-up as follows:

- a) The Departmental Representative will establish the scope of services to be performed. For each individual Call-Up, consultants will be considered using a computerized distribution system. This system will track all call-ups assigned to each consultant and will maintain a running total of the dollar value of business distributed. The system will contain for each consultant an ideal business distribution percentage which has been established as follows; 35% of the business for the top ranked consultant, 28% for the 2nd ranked consultant, 21% for the 3rd ranked consultant and 16% for the 4th ranked consultant. In the event fewer than four consultants are successful, the undistributed % of business will be redistributed amongst the offerors being recommended using the following formula:

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

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

- b) The Consultant will be provided the scope of services and will submit a proposal to the Departmental Representative in accordance with the fixed hourly rates established under the Standing Offer. The Consultant's proposal shall include the category of personnel, name of personnel and the number of hours estimated/required to perform the services, as well as an estimate of proposed disbursements, if applicable. If the Consultant is unable to provide the services of an individual named in its proposal (submitted in response to the Request for Standing Offer), the Consultant may propose a substitute with at least the same qualifications and experience in the estimation of Canada. The Consultant must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement for Canada's approval in its sole discretion. If the Consultant is unable to provide a substitute with similar qualifications and experience, Canada may set aside the standing offer;
- c) For services from a Specialist Consultant that is not named or for which discipline is not identified in the Standing Offer, the Consultant's proposal shall include the category and name of personnel as well as their hourly rate(s) with the number of hours estimated/required by the Specialist Consultant to perform these services. A fixed fee or, where it is not possible or appropriate to agree upon a fixed fee, a time based fee to an upset limit will be established;
- d) For the preparation of bilingual documents, the Consultant shall estimate the required number of hours and multiply by the hourly rates established in the Standing Offer. If the services of a translation firm are required to produce bilingual documents, these costs shall be treated as a disbursement;
- e) A fixed fee or, where it is not possible or appropriate to agree upon a fixed fee, a time based fee to an upset limit will be established in accordance with the hourly rate(s) established in the Standing Offer;
- f) Standing Offer holders not possessing the required security clearance at time of call up, will be bypassed and PWGSC will proceed to the next consultant who possesses the required security clearance and it is furthest away from the ideal business distribution.

2. The Consultant will be authorized in writing by the Contracting Authority to proceed with the services by issuance of a Call-up against the Standing Offer.

3. Any proposed changes to the scope of work are to be discussed with the Departmental Representative but any resulting changes can only be authorized by an amendment issued by the Contracting Authority.

SP 6 INVOICING

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

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

TERMS AND CONDITIONS

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

0220DA**GENERAL CONDITIONS**

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

GC 1 Definitions

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

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

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

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

Canada, Crown, Her Majesty or the Government

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

GC 2 Interpretations

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

GC 3 Not Applicable

GC 4 Assignment

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

GC 5 Indemnification

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

GC 6 Notices

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

GC 7 Suspension

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

If Canada and the *Consultant* do not agree that performance of the *Services* shall be continued by the *Consultant*, or upon the terms and conditions under which the *Consultant* shall continue the *Services*, the notice of suspension shall be deemed to be a notice of termination in accordance with the terms of GC 8. For clarity, Termination Costs in TP 9 of clause 9998DA, Terms of Payment

shall be without duplication of Suspension Costs provisions in TP8 of clause 9998DA, Terms of Payment.

GC 8 Termination

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

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

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

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

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

GC 11 National or Departmental Security

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

GC 12 Rights to Intellectual Property

1. Definitions

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

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

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

"Invention" means any new and useful art, process, machine, manufacture or composition of matter, or any new and useful improvement in any art, process, machine, manufacture or

composition of matter, whether or not patentable and without limiting the foregoing the term includes any unique design and construction system;

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

2. Identification and Disclosure of Foreground

The *Consultant* shall:

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

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

3. IP Rights Vest with *Consultant*

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

4. Ownership Rights in Deliverables

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

5. Licence to Foreground

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

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

6. Licence to Foreground for Other Projects

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

7. Licence to Background

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

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

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

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

The *Consultant* acknowledges that *Canada* may wish to award contracts, which may include a competitive process, for any of the purposes contemplated in article GC 12.5, GC 12.6 and GC 12.7. The *Consultant* agrees that *Canada's* licence in relation to the IP Rights in the Foreground

and in the Background, includes the right to disclose that Foreground and Background to bidders for such contracts, and to sub-license or otherwise authorize the use of that Foreground and Background by any contractor or consultant engaged by *Canada* for the purpose of carrying out such a contract.

9. *Consultant's Right to Grant Licence*

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

10. Trade Secrets and Confidential Information

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

11. *Canada* Supplied Information

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

12. Transfer of IP Rights

- (a) If *Canada* takes the *Services* out of the *Consultant's* hands in accordance with GC 9 of the General Conditions, in whole or in part, or if the *Consultant* fails to disclose any Foreground in accordance with article GC 12.2, *Canada* may upon reasonable notice, require the *Consultant* to convey to *Canada* all of the IP Rights in the Foreground or in the case of a failure to disclose, all the IP Rights in the Foreground not provided. The IP Rights to be conveyed shall include the IP Rights in any Foreground that have vested or are to vest in a *Sub-Consultant*. In the case of IP Rights in Foreground which have been sold or assigned to a party other than a *Sub-Consultant*, the *Consultant* shall not be obligated to convey

those IP Rights to *Canada*, but shall pay to *Canada* on demand an amount equal to the consideration which the *Consultant* received from the sale or assignment of the IP Rights in that Foreground or, in the case of a sale or assignment was not at arms length, the fair market value of the IP Rights in that Foreground, in each case including the value of future royalties or licence fees;

- (b) In the event of the issuance by Canada of a notice referred to in (a), the *Consultant* shall, at the *Consultant's* own expense and without delay, execute such conveyances or other documents relating to title to the IP Rights as Canada may require, and the *Consultant* shall, at *Canada's* expense, afford Canada all reasonable assistance in the preparation of applications and in the prosecution of any applications for, or any registration of, any IP Right in any jurisdiction, including without limitation the assistance of the inventor in the case of Inventions;
- (c) Until the *Consultant* completes the performance of the *Services* and discloses all of the Foreground in accordance with article GC 12.2, and subject to the provisions of GC 11 National or Departmental Security, the *Consultant* shall not, without the prior written permission of Canada, sell, assign or otherwise transfer title to the IP Rights in any of the Foreground, or license or otherwise authorize the use of the IP Rights in any of the Foreground by any person;
- (d) In any sale, assignment, transfer or licence of IP Rights in Foreground by the *Consultant* except a sale or licence for end use of a product based on Foreground, the *Consultant* shall impose on the other party all of its obligations to *Canada* in relation to the IP Rights in the Foreground and any restrictions set out in the Standing Offer and/or Call-Up on the use or disposition of the IP Rights in the Foreground (and, if applicable, the Foreground itself), including the obligation to impose the same obligations and restrictions on any subsequent transferee, assignee or licensee. The *Consultant* shall promptly notify *Canada* of the name, address and other pertinent information in regard to any transferee, assignee or licensee.

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

- 1. The *Consultant* declares that the *Consultant* has no pecuniary interest in the business of any third party that would cause, or seem to cause, a conflict of interest in carrying out the *Services*, and should such an interest be acquired during the life of the Standing Offer, the *Consultant* shall declare it immediately to the *Departmental Representative*.
- 2. The *Consultant* shall not have any tests or investigations carried out by any persons, firms, or corporations, that may have a direct or indirect financial interest in the results of those tests or investigations.
- 3. The *Consultant* shall not submit, either directly or indirectly, a bid for any Construction Contract related to the Project.
- 4. The *Consultant* acknowledges that individuals who are subject to the provisions of the Conflict of Interest Act, 2006, c. 9, s.2, the Conflict of Interest Code for Members of the House of Commons, the Values and Ethics Code for the Public Services, or all other codes of values and ethics applicable within specific organizations cannot derive any direct benefit resulting from the Standing Offer or subsequent Call-ups.
- 5. (a) The *Consultant* shall not be eligible to compete as a consultant or sub-consultant for a project which may result from the provision of the *Services* if the *Consultant* is involved in the development of a Project Brief or Terms of Reference, a Request for Proposal or similar documents for such project;

- (b) The Consultant providing certain pre-design services (e.g. studies, analysis, schematic design) that do not involve the development of a Project Brief or Terms of Reference, a Request for Proposal or similar documents for such project may be eligible to compete as a consultant or sub-consultant for a project which may result from the provision of these services. The experience acquired by a Consultant who has only provided pre-design services, where the information / documentation resulting from these services is made available to other proponents, will not be considered by Canada as conferring an unfair advantage or creating a conflict of interest.

GC 14 Status of Consultant

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

GC 15 Declaration by Consultant

The *Consultant* declares that:

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

GC 16 Insurance Requirements

1. General

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

2. Commercial General Liability

- a) The insurance coverage provided shall not be less than that provided by IBC Form 2100, as amended from time to time, and shall have: a limit of liability of not less than \$5,000,000.00 per occurrence; an aggregate limit of not less than \$5,000,000.00 within any policy year;

- b) The policy shall insure the Consultant and shall include Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services as an Additional Insured, with respect to liability arising out of the performance of the Services.

3. Professional Liability

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

GC 17 Resolution of Disagreements

1. In the event of a disagreement regarding any aspect of the *Services* or any instructions given under the Standing Offer and subsequent Call-ups:
 - (a) The *Consultant* may give a notice of disagreement to the *Departmental Representative*. Such notice shall be promptly given and contain the particulars of the disagreement, any changes in time or amounts claimed, and reference to the relevant clauses of the Standing Offer and Call-up;
 - (b) The *Consultant* shall continue to perform the *Services* in accordance with the instructions of the *Departmental Representative*;
 - (c) The *Consultant* and the *Departmental Representative* shall attempt to resolve the disagreement by negotiations conducted in good faith. The negotiations shall be conducted, first, at the level of the *Consultant's* project representative and the *Departmental Representative* and, secondly and if necessary, at the level of a principal of the *Consultant* firm and a senior departmental manager.
2. The *Consultant's* continued performance of the *Services* in accordance with the instructions of the *Departmental Representative* shall not jeopardize the legal position of the *Consultant* in any disagreement.
3. If it was subsequently agreed or determined that the instructions given were in error or contrary to the Standing Offer or Call-up, *Canada* shall pay the *Consultant* those fees the *Consultant* shall have earned as a result of the change(s) in the *Services* provided, together with those reasonable disbursements arising from the change(s) and which have been authorized by the *Departmental Representative*.
4. The fees mentioned in GC 17.3 shall be calculated in accordance with the Terms of Payment set out in the Standing Offer and the relevant Call-up.
5. If the disagreement is not settled, the *Consultant* may make a request to the *Departmental Representative* for a written departmental decision and the *Departmental Representative* shall give notice of the departmental decision within fourteen (14) days of receiving the request, setting out the particulars of the response and any relevant clauses of the Standing Offer or Call-up.
6. Within fourteen (14) days of receipt of the written departmental decision, the *Consultant* shall notify the *Departmental Representative* if the *Consultant* accepts or rejects the decision.

7. If the *Consultant* rejects the departmental decision, the *Consultant*, by notice may refer the disagreement to *Mediation*.
8. If the disagreement is referred to *Mediation*, the *Mediation* shall be conducted with the assistance of a skilled and experienced mediator chosen by the *Consultant* from a list of mediators proposed by Canada, and departmental *Mediation* procedures shall be used unless the parties agree otherwise.
9. Negotiations conducted under the Standing Offer and any resulting Call-up, including those conducted during *Mediation*, shall be without prejudice.

GC 18 Amendments

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

GC 19 Entire Agreement

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

GC 20 Contingency Fees

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

GC 21 Harassment in the Workplace

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

GC 22 Taxes

1. Federal government departments and agencies are required to pay *Applicable Taxes*.
2. *Applicable Taxes* will be paid by Canada as provided in the invoice submission. *Applicable Taxes* must be specified on all invoices as a separate item along with corresponding registration numbers from the tax authorities. All items that are zero-rated, exempt or to which these *Applicable Taxes* do not apply must be identified as such on all invoices. It is the sole responsibility of the Consultant

to charge *Applicable Taxes* at the correct rate in accordance with applicable legislation. The Consultant agrees to remit to appropriate tax authorities any amounts of *Applicable Taxes* paid or due.

3. The Consultant is not entitled to use Canada's exemptions from any tax, such as provincial sales taxes, unless otherwise specified by law. The Consultant must pay applicable provincial sales tax, ancillary taxes, and any commodity tax, on taxable goods or services used or consumed in the performance of the contract (in accordance with applicable legislation), including for material incorporated into real property.
4. In those cases where *Applicable Taxes*, customs duties, and excise taxes are included in the *Contract Price*, the *Contract Price* will be adjusted to reflect any increase, or decrease, of *Applicable Taxes*, customs duties, and excise taxes that will have occurred between bid submission and contract award. However, there will be no adjustment for any change to increase the *Contract Price* if public notice of the change was given before bid submission date in sufficient detail to have permitted the Consultant to calculate the effect of the change.
5. Tax Withholding of 15 Percent - Canada Revenue Agency

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

GC 23 Changes in the *Consultant* team

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

GC 24 Joint and Several Liability

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

GC 25 Performance evaluation - contract

1. The performance of the Consultant during and upon completion of the services will be evaluated by Canada. The evaluation includes all or some of the following criteria:
 - a. Design;
 - b. quality of Results;
 - c. management;
 - d. time;
 - e. cost.
2. A weighting factor of 20 points will be assigned to each of the five criteria as follows:
 - a. unacceptable: 0 to 5 points;
 - b. not satisfactory: 6 to 10 points;
 - c. satisfactory: 11 to 16 points;
 - d. superior: 17 to 20 points.
3. The consequences resulting from the performance evaluation are as follows:
 - a. For an overall rating of 85% or higher, a congratulation letter is sent to the Consultant;
 - b. For an overall rating of between 51% and 84%, a standard "meets expectations", letter is sent to the Consultant;
 - c. For an overall rating of between 30% and 50%, a warning letter is sent to the Consultant indicating that if, within the next two years from the date of the letter, they receive 50% or less on another evaluation, the Consultant may be suspended from any new Public Works and Government Services Canada (PWGSC) solicitations for construction services, architectural and engineering services or facility maintenance services, of real property projects, for a period of one year;
 - d. For an overall rating of less than 30%, a suspension letter is sent to the Consultant indicating that the Consultant is suspended from any new PWGSC solicitations for construction services, architectural and engineering services or facility maintenance services, of real property projects, for a period of one year from the date of the letter;
 - e. When general average is between 30% and 50% and one of the rating is of 5 points or less on any one criterion, a suspension letter is sent to the Consultant indicating that the Consultant is suspended from any new PWGSC solicitations for construction services, architectural and engineering services or facility maintenance services, of real property projects, for a period of one year from the date of the letter.

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

GC 26 International Sanctions

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

GC 27 Integrity Provisions - Standing Offer

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

GC 28 Code of Conduct for Procurement – Standing Offer

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

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

During the period of the Standing Offer, Canada may transition to an EPS for more efficient processing and management of individual call-ups for any or all of the SO's applicable goods and services. Canada reserves the right, at its sole discretion, to make the use of the new e-procurement solution mandatory. Canada agrees to provide the Offeror with at least a three-month notice to allow for any measures necessary for the integration of the Offer into the EPS. The notice will include a detailed information package indicating the requirements, as well as any applicable guidance and support. If the Offeror chooses not to offer their goods or services through the e-procurement solution, the Standing Offer may be set aside by Canada.

SC 1 Language Requirements

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

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

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

9998DA TERMS OF PAYMENT

TP 1 Fees

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

TP 2 Payments to the Consultant

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

TP 3 Delayed Payment

1. If *Canada* delays in making a payment that is due in accordance with TP 2, the *Consultant* will be entitled to receive interest on the amount that is overdue for the period of time as defined in TP 3.2 including the day previous to the date of payment. Such date of payment shall be deemed to

be the date on the cheque given for payment of the overdue amount. An amount is overdue when it is unpaid on the first day following the due date described in TP 2.1.

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

TP 4 Claims Against, and Obligations of, the Consultant

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

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

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

TP 5 No Payment for Errors and Omissions

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

TP 6 Payment for Changes and Revisions

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

TP 7 Extension of Time

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

TP 8 Suspension Costs

1. In the event of a suspension of any *Services* pursuant to GC 7 of clause 0220DA, General Conditions, *Canada* shall pay:
 - (a) for clarity, an amount based on these Terms of Payment, for *Services* satisfactorily performed before the date of suspension;
 - (b) those out-of-pocket costs and expenses that, in the opinion of *Canada*, are substantiated as having been reasonably incurred during the suspension period, as more particularly provided for in TP 8.2, .3, and .4.
2. The *Consultant* shall minimize all TP8 1(b) out-of-pocket costs and expenses.
3. Within fourteen (14) days of notice of such suspension, the *Consultant* shall submit to the Departmental Representative a schedule of all out-of-pocket costs and expenses, if any, that the *Consultant* expects to incur during the period of suspension, and for which the *Consultant* will request reimbursement, failing which, the *Consultant* shall, for all purposes, be deemed to have no such costs and expenses.
4. Save and except for the specified payment provided for in TP8 (1b), if any, the *Consultant* shall not be paid and has no claim for damages, compensation, loss of profit, loss of opportunity, allowance or otherwise by reason of, or directly or indirectly arising out of, the suspension of *Services* pursuant to GC 7 of clause 0220DA, General Conditions.

TP 9 Termination Costs

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

TP 10 Disbursements

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

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

9999DA CONSULTANT SERVICES

CS 1 Services

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

CS 2 Standard of Care

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

CS 3 Time Schedule

The *Consultant* shall:

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

CS 4 Project Information, Decisions, Acceptances, Approvals

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

CS 5 Changes in Services

The *Consultant* shall:

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

CS 6 Codes, By-Laws, Licences, Permits

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

CS 7 Provision of Staff

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

CS 8 Sub-Consultants

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

CS 9 Cost Control

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

1. Throughout Project development, the *Construction Cost Estimate* prepared by the *Consultant* shall not exceed the *Construction Cost Limit*.
2. In the event that the *Consultant* considers that the *Construction Cost Estimate* will exceed the *Construction Cost Limit*, the *Consultant* shall notify the *Departmental Representative* and
 - (a) if the excess is due to factors under the control of, or reasonably foreseeable by the *Consultant*, the *Consultant* shall, if requested by the *Departmental Representative*, and at no additional cost to *Canada*, make such changes or revisions to the design as may be necessary to bring the *Construction Cost Estimate* within the *Construction Cost Limit*; or
 - (b) if the excess is due to factors that are not under the control of the *Consultant*, changes or revisions may be requested by the *Departmental Representative*. Such changes or revisions shall be undertaken by the *Consultant* at *Canada's* expense, and the cost involved shall become an amount to be mutually agreed, prior to performance of the said changes or revisions.
3. If the lowest price obtained by bid process or negotiation exceeds the *Construction Cost Limit*, and if the excess is due to reasons within the control of, or reasonably foreseeable by the *Consultant*, the *Consultant* shall, if requested by the *Departmental Representative*, and without additional

charge, be fully responsible for revising the Project scope and quality as required to reduce the construction cost and shall modify the construction documents as necessary to comply with the *Construction Cost Limit*.

2000DA CALCULATION OF FEES

CF 1 Fee Arrangement(s) for Services

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

CF 2 Payments for Services

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

SUBMISSION REQUIREMENTS AND EVALUATION (SRE)

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

SUBMISSION REQUIREMENTS AND EVALUATION

SRE 1 GENERAL INFORMATION

1.1 Reference to the Selection Procedure

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

1.2 Submission of Proposals

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

1.3 Calculation of Total Score

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

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

SRE 2 PROPOSAL REQUIREMENTS

2.1 Requirement for Proposal Format

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

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

2.2 Specific Requirements for Proposal Format

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

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

- Covering letter;
- Declaration/Certifications Form (Appendix A);
- Integrity Provisions –Required Documentation;
- Front page of the Request for Standing Offer document;
- Front page of revision(s) to the Request for Standing Offer document;
- Price Proposal Form (Appendix B).

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

SRE 3 SUBMISSION REQUIREMENTS AND EVALUATION

3.1 MANDATORY REQUIREMENTS

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

3.1.1 Declaration/Certifications Form

Proponents must complete, sign and submit the following:

- Appendix A, Declaration / Certifications Form as required.

3.1.2 Licensing, Certification or Authorization

The Proponent shall be authorized to provide Environmental and Geotechnical Engineering services and must include an Environmental and Geotechnical engineer 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 or Québec. If the Proponent is licensed to practise in only one of the two provinces then that Proponent must be eligible and willing to be licensed in the province in which they are not licensed.

You must indicate current license or how you intend to meet the provincial licensing requirements.

3.1.3 Integrity Provisions – Required documentation

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

3.2 RATED REQUIREMENTS

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

3.2.1 Comprehension of the Scope of Services

1. *What we are looking for:*
A demonstration of the understanding of the overall requirements for environmental and geotechnical services, including specific deliverables, expected approaches, technical expectations, and coordination requirements, especially in delivering government projects.
2. *What the Proponent should provide:*
 - a) overall comprehension of the Scope of Services;
 - b) summary of your proposed typical work breakdown structure, i.e. resources assigned, time schedule, level of effort;
 - c) project management approach to working with PWGSC (understanding of PWGSC management structure, Client environment, standing offer process, working with the government in general);
 - d) coordination between environmental and geotechnical team members for combined projects.

3.2.2 Team Approach / Management of Services

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

3.2.3 Past Experience – Environmental Engineering

1. *What we are looking for:*
Demonstration that over at least the past five years, the Proponent has participated in a range of projects requiring a full scope of services in accordance with the Required Services (RS) section relevant to the environmental engineering discipline (RS 1 to RS 5 and RS 12 and 13). The Proponent's participation in these projects should have involved the scope of services listed in the Required Services (RS) section.
2. *What the Proponent should provide:*
 - a) A brief description of a maximum of seven significant Environmental Engineering projects completed over the last five years by the Proponent. At a minimum, the projects must include:
 - i. two significant environmental site assessment projects. These projects shall include Phase I, II and III Environmental Site Assessments;
 - ii. two risk assessments (as per RS 2);
 - iii. one remediation project (as per RS 3);
 - iv. One example of the development of soil and groundwater management plans in support of significant construction projects (as per RS 1); and
 - v. One project involving the development of best practices and tools related to contaminated sites management (as per RS 5).
 - b) For the above projects, include the names of senior personnel and project personnel who were involved as part of the project team and their respective responsibilities, as well as the scope, and budget per discipline;
 - c) Indicate the dates the services were provided for the listed projects;
 - d) Scope of services rendered, project objectives, constraints and deliverables;
 - e) Client references - name, address, phone and fax of client contact at working level. Reference checks may be completed if deemed necessary.
3. The Proponent (as defined in General Instructions GI 1) must have conducted the above projects. Past project experience from entities other than the Proponent will not be considered in the evaluation unless these entities form part of a joint venture Proponent.
4. Please indicate those projects which were carried out in joint venture and the responsibilities of each of the involved entities in each project.

3.2.4 Past Experience – Geotechnical Engineering

1. *What we are looking for:*
Demonstration that over at least the past five years, the Proponent has participated in a range of projects requiring a full scope of services in accordance with the Required Services (RS) section, i.e. RS 6 to RS 13. The Proponent's participation in these projects should have involved the scope of services listed in the Required Services (RS) section.
2. *What the Proponent should provide:*
 - a) A brief description of a maximum of four significant Geotechnical Engineering projects completed over the last five years by the Proponent;
 - b) For the above projects, include the names of senior personnel and project personnel who were involved as part of the project team and their respective responsibilities, as well as the scope, and budget per discipline;
 - c) Indicate the dates the services were provided for the listed projects;
 - d) Scope of services rendered, project objectives, constraints and deliverables;
 - e) Client references - name, address and phone of client contact at working level. Reference checks may be completed if deemed necessary.
3. The Proponent (as defined in General Instructions GI 1) must have conducted the above projects. Past project experience from entities other than the Proponent will not be considered in the evaluation unless these entities form part of a joint venture Proponent.
4. Please indicate those projects which were carried out in joint venture and the responsibilities of each of the involved entities in each project.

3.2.5 Senior Environmental Personnel Expertise and Experience

1. *What we are looking for:*
A demonstration that the Proponent has senior personnel in-house with the capability, capacity and expertise in each area listed in the Required Services (RS) section (RS 1 through 5 and RS 13).
2. *What the Proponent should provide: (approximately two (2) pages **per** senior personnel)*
 - a) submit a maximum of four c.v.'s of senior personnel. Each curriculum vitae should clearly indicate the years of experience the senior personnel has in the provision of the services specified in the Required Services (RS) section; The selection of the senior project team members should cover the range of expertise and skill sets required to deliver on the provision of the full range of services specified in the Required Services (RS) sections RS1 through RS5 and RS 13.; and
 - b) Identify the personnel's years of experience, the number of years with the firm;
 - c) professional accreditation;
 - d) accomplishments/achievements/awards.
3. In-house personnel means personnel within the Proponent's organization (see definition of Proponent in General Instructions GI 1). Past expertise and experience of personnel acquired prior to joining the Proponent's (or joint venture Proponent's) organization will also be considered in the evaluation.

4. Senior personnel can also show capacity and expertise in both environmental and geotechnical.

3.2.6 Senior Geotechnical Personnel Expertise and Experience

1. *What we are looking for:*
A demonstration that the Proponent has senior personnel in-house with the capability, capacity and expertise in each area listed in the Required Services (RS) section, i.e. RS 6 to RS 13. Considerations will be given to Proponent's team members who are licensed in both provinces.
2. *What the Proponent should provide: (approximately two pages **per** senior personnel)*
 - a) submit a maximum of two c.v.'s of senior personnel. Each curriculum vitae should clearly indicate the years of experience the senior personnel has in the provision of the services specified in the RS section;
 - b) Identify the personnel's years of experience, the number of years with the firm;
 - c) professional accreditation;
 - d) accomplishments/achievements/awards;
3. In-house personnel means personnel within the Proponent's organization (see definition of Proponent in General Instructions GI 1). Past expertise and experience of personnel not within the Proponent's (or joint venture Proponent's) organization will be considered in the evaluation.
4. Senior personnel can also show capacity and expertise in both environmental and geotechnical.

3.2.7 Environmental Project Personnel Expertise and Experience

1. *What we are looking for: (approximately two pages **per** project personnel)*
A demonstration that the Proponent has project personnel in-house with the capability, capacity and expertise to provide the required services and deliverables listed in Required Services (RS) sections RS1 through 5 and RS 13.
2. *What the Proponent should provide: (approximately two pages **per** project personnel)*
 - a) submit a maximum of five (5) c.v.'s of project personnel which will perform the majority of the work resulting from the individual Call-ups. Each curriculum vitae should clearly indicate the years of experience the project personnel has in the provision of the services specified in the Required Services (RS) section;
 - b) Identify the personnel's years of experience, the number of years with the firm;
 - c) professional accreditation;
 - d) accomplishments/achievements/awards.
3. In-house personnel means personnel within the Proponent's organization (see definition of Proponent in General Instructions GI 1). Past expertise and experience of personnel not within the Proponent's (or joint venture Proponent's) organization will be considered in the evaluation.
4. Environmental project personnel can also show capacity and expertise in geotechnical.

3.2.8 Geotechnical Project Engineer Expertise and Experience

1. *What we are looking for:*
A demonstration that the Proponent has project engineer in-house with the capability, capacity and expertise to provide the required services and deliverables listed in the Required Services (RS) section, i.e. RS 6 to RS 13. The geotechnical project engineer is to be executing and coordinating the project on a day to day basis. Considerations will be given to Proponent's team members who are licensed in both provinces.
2. *What the Proponent should provide: (approximately two pages **per** project engineer)*
 - a) submit a maximum of two (2) c.v.'s of project engineers which will perform the majority of the work resulting from the individual Call-ups. Each curriculum vitae should clearly indicate the years of experience the project engineer has in the provision of the services specified in the Required Services (RS) section;
 - b) Identify the personnel's years of experience, the number of years with the firm;
 - c) professional accreditation;
 - d) accomplishments/achievements/awards;
 - e) the role of the geotechnical project engineer as per the RS.
3. In-house personnel means personnel within the Proponent's organization (see definition of Proponent in General Instructions GI 1). Past expertise and experience of personnel not within the Proponent's (or joint venture Proponent's) organization will be considered in the evaluation.
4. Geotechnical project engineer can also show capacity and expertise in environmental.

3.2.9 Geotechnical Field Technician Expertise and Experience

1. *What we are looking for:*
A demonstration that the Proponent has Field Technician in-house with the capability, capacity and expertise to provide the required services and deliverables listed in the Required Services (RS) section, i.e. RS 6 and RS 7. The geotechnical field technician is to be coordinating and supervising all fieldworks onsite and collecting data as per applicable standards and industry best practices.
2. *What the Proponent should provide: (approximately two pages **per** field technician)*
 - a) submit a maximum of two (2) c.v.'s of field technician which will perform the majority of the work resulting from the individual Call-ups. Each curriculum vitae should clearly indicate the years of experience the field technician has in the provision of the services specified in the Required Services (RS) section;
 - b) Identify the personnel's years of experience, the number of years with the firm;
 - c) professional accreditation;
 - d) the role of the geotechnical field technician as per the RS.
3. In-house personnel means personnel within the Proponent's organization (see definition of Proponent in General Instructions GI 1). Past expertise and experience of personnel not within the Proponent's (or joint venture Proponent's) organization will be considered in the evaluation.
4. Geotechnical field technician can also show capacity and expertise in environmental.

3.3 EVALUATION AND RATING

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

Criterion	Weight Factor	Rating	Weighted Rating
Comprehension of the Scope of Services	1.0	0 - 10	0 - 10
Team Approach / Management of Services	1.0	0 - 10	0 - 10
Past Experience – Environmental Engineering	1.75	0 - 10	0 – 17.5
Past Experience – Geotechnical Engineering	1.75	0 - 10	0 – 17.5
Environmental Senior Personnel Expertise and Experience	1.0	0 - 10	0 - 10
Geotechnical Senior Personnel Expertise and Experience	0.75	0 - 10	0 -7.5
Environmental Project Personnel Expertise and Experience	1.25	0 - 10	0 – 12.5
Geotechnical Project Engineer Expertise and Experience	1.0	0 - 10	0 - 10
Geotechnical Field Technician Expertise and Experience	0.5	0 - 10	0 - 5
Total	10		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 below:

	INADEQUATE	WEAK	ADEQUATE	FULLY SATISFACTORY	STRONG
0 point	2 points	4 points	6 points	8 points	10 points
Did not submit information which could be evaluated	Lacks complete or almost complete understanding of the requirements.	Has some understanding of the requirements but lacks adequate understanding in some areas of the requirements.	Demonstrates a good understanding of the requirements.	Demonstrates a very good understanding of the requirements.	Demonstrates an excellent understanding of the requirements.
	Weaknesses cannot be corrected	Generally doubtful that weaknesses can be corrected	Weaknesses can be corrected	No significant weaknesses	No apparent weaknesses
	Proponent do not possess qualifications and experience	Proponent lacks qualifications and experience	Proponent has an acceptable level of qualifications and experience	Proponent is qualified and experienced	Proponent is highly qualified and experienced
	Team proposed is not likely able to meet requirements	Team does not cover all components or overall experience is weak	Team covers most components and will likely meet requirements	Team covers all components - some members have worked successfully together	Strong team - has worked successfully together on comparable projects
	Sample projects not related to this requirement	Sample projects generally not related to this requirement	Sample projects generally related to this requirement	Sample projects directly related to this requirement	Leads in sample projects directly related to this requirement
	Extremely poor, insufficient to meet performance requirements	Little capability to meet performance requirements	Acceptable capability, should ensure adequate results	Satisfactory capability, should ensure effective results	Superior capability, should ensure very effective results

To be considered further, proponents **must** achieve a minimum weighted rating of six (6) out of 10 for all criteria.

No further consideration will be given to proponents not achieving a minimum rating of six (6) out of 10 for all criteria.

SRE 4 PRICE OF SERVICES

1. To be declared responsive, a bid must:
 - a. Comply with all the requirements of the bid solicitation;
 - b. Meet all mandatory criteria;
2. Bids not meeting (a) and (b) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 90% for the technical merit and 10% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 90%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 10%.
6. All price proposals which are greater than 35 percent above the average price will cause their respective complete proposals to be set aside and receive no further consideration.
7. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
8. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a Standing Offer.

The table below illustrates an example where all three bids are responsive and the selection of the consultant is determined by a 90/10 ratio of technical merit and price, respectively. The total available points equals 100 and the lowest evaluated price is \$8,850.00.

Basis of Selection - Highest Combined Rating Technical Merit (90%) and Price (10%)

		Proponent 1	Proponent 2	Proponent 3
Overall Technical Score		65/100	70/100	78/100
Bid Evaluated Price		\$9,850.00	\$8,850.00	\$10,500.00
Calculations	Technical Merit Score	$65/100 \times 90 = 58.5$	$70/100 \times 90 = 63$	$78/100 \times 90 = 70.2$
	Pricing Score	$8850/9850 \times 10 = 8.98$	$8850/8850 \times 10 = 10$	$8850/10500 \times 10 = 8.43$
Combined Rating		67.48	73	78.63
Overall Rating		3 rd	2 nd	1 st

SRE 5 TOTAL SCORE

Total Scores will be established in accordance with the following:

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

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

SRE 6 SUBMISSION REQUIREMENTS - CHECKLIST

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

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

- ☐ Declaration / Certifications Form - completed and signed form provided in Appendix A.
- ☐ Integrity Provisions – Required documentation – **as applicable**, in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per General instructions to Proponents (GI), Integrity Provisions – Proposal, **section 3a**.
- ☐ Integrity Provisions - Declaration of Convicted Offences – **with its bid, as applicable**, in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per General instructions to Proponents (GI), Integrity Provisions – Proposal, **section 3b**.
- ☐ Proposal - 1 original + 5 copies.
- ☐ Front page of Request for Standing Offer.
- ☐ Front page of Revision(s) to a Request for Standing Offer.

In a separate envelope:

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

APPENDIX A

Declaration/Certifications Form

Declaration / Certifications Form (page 1 of 5)

Name of Proponent:

Street Address:

Mailing Address (if different than street address)

City:

City:

Prov./Terr./State:

Prov./Terr./State:

Postal/ZIP Code:

Postal/ZIP Code:

Telephone Number:()

Fax Number: ()

E-Mail:

Procurement Business Number:

Type of Organization

___ Sole Proprietorship

___ Partnership

___ Corporation

___ Joint Venture

Size of Organization

Number of Employees _____

Graduate Architects/ _____

Prof. Engineers:

Other Professionals _____

Technical Support _____

Other _____

Declaration / Certifications Form (page 2 of 5)

Federal Contractors Program for Employment Equity - Certification

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

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

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

Complete both A and B.

A. Check one of the following:

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

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

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

OR

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

B. Check only one of the following:

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

OR

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

Declaration / Certifications Form (page 3 of 5)

Former Public Servant (FPS) - Certification

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

Definitions

For the purposes of this clause,

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

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

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

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

Former Public Servant in Receipt of a Pension

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

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

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

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

Declaration / Certifications Form (page 4 of 5)

Work Force Adjustment Directive

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

If so, the Proponent must provide the following information:

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

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

Declaration / Certifications Form (page 5 of 5)

Name of Proponent:

This Declaration forms part of the offer.

Education, Professional Accreditation and Experience:

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

DECLARATION:

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

Name (print): _____

Capacity: _____

Signature _____

Telephone Number: () _____

Fax Number: () _____

E-mail: _____

Date: _____

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

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

APPENDIX B

Price Proposal Form

APPENDIX B - PRICE PROPOSAL

INSTRUCTIONS

1. Complete price proposal and as per GI 9.
2. Proponents are not to alter or add information to the form.
3. In order to ensure that fair and competitive hourly all-inclusive rates are received for each of the positions listed, the following requirement must be strictly adhered to:
 - a. Proponents must provide an hourly all-inclusive rate for each listed position.
 - b. In the event that the firm consists of fewer personnel than listed, provide an hourly all-inclusive rate that corresponds with each position listed.
 - c. The hourly all-inclusive rate provided must be equal to or greater than the hourly all-inclusive rate provided for the position listed below it. For example, if the firm does not have an Intermediate Personnel, the hourly all-inclusive rate provided must be equal to or greater than the hourly all-inclusive rate provided for the Junior Personnel.
 - d. The hourly all-inclusive rate for any given category of personnel cannot be \$0 or nil value. Failure to insert an hourly all-inclusive rate for each position listed will render your proposal non-responsive.
4. The Proponent shall provide a single fixed hourly all-inclusive rate for each sub-consultant identified.
 - a. Fixed hourly all-inclusive rate for each category of personnel of the Prime Consultant and Sub-Consultant & Specialists provided by the offeror will be used for years 1 and 2 of the Standing Offer;
 - b. The Standing Offer rates for year 3 and 4 will be determined by using the rates provided for years 1 and 2 adjusted by a percentage increase of 2.0%;
5. Travel and Living Expenses: Firms are advised that any travel time and travel-related expenses associated with the delivery of services within a 50 km radius of Parliament Hill are to be calculated as an integral part of the hourly rates. For delivery of services outside of this 50 km radius, travel-related expenses will be paid (with prior approval of the Departmental Representative) in accordance with current National Joint Council Travel Directive (<https://www.njc-cnm.gc.ca/s3/en>).
6. Training: Firms are advised that all training time is to be calculated as an integral part of the hourly all-inclusive rates, for all training provided by PWGSC.

In the event of a mathematical error, refer to GI 10.5.

APPENDIX B - PRICE PROPOSAL

Name of Proponent: _____

Table 1 – Environmental services

Environmental Personnel	Weight Factor (A)	Fixed Hourly Rate (all inclusive) (B)	Total (A X B)
Senior Personnel / Senior Project Manager	20	\$	\$
Intermediate (Project) Personnel	40	\$	\$
Field Technician / Junior Personnel	30	\$	\$
Drafting Support	10	\$	\$
Total for Table 1:			\$

Table 2 – Geotechnical Engineering services

Geotechnical Personnel	Weight Factor (C)	Fixed Hourly Rate (all inclusive) (D)	Total (C X D)
Senior Engineer / Senior Project Manager	20	\$	\$
Intermediate (Project) Engineer	40	\$	\$
Field Technician / Junior Engineer	30	\$	\$
Drafting Support	10	\$	\$
Total for Table 2:			\$

Senior Personnel: is licensed as a professional, having a minimum of twelve (12) years' relevant environmental and/or geotechnical engineering experience.

Intermediate Personnel: is licensed as a professional, having five (5) to eleven (11) years' relevant environmental and/or geotechnical engineering experience.

Field Technician/Junior Personnel : having a minimum of five (5) years' experience as a field technician or having zero (0) to four (4) years' relevant environmental and/or geotechnical engineering experience.

Drafting Support : no minimum experience.

Summary Table 3

Total for Table 1		\$
Total for Table 2	+	\$
Grand Total for evaluation purposes	=	\$

END OF PRICE PROPOSAL FORM

General Project Objectives (for Call-ups)

GPO 1 GENERAL OBJECTIVES

Project Administration

- PA 1.1 GENERAL ROLES AND RESPONSIBILITIES
- PA 1.2 COORDINATION WITH PWGSC
- PA 1.3 PROJECT RESPONSE TIME REQUIREMENTS
- PA 1.4 PROJECT START-UP MEETING
- PA 1.5 OFFICIAL LANGUAGES
- PA 1.6 NON-ENVIRONMENTAL OR GEOTECHNICAL ENGINEERING EXPERTISE

Required Services

- RS 1 PHASED ENVIRONMENTAL SITE ASSESSMENTS
- RS 2 HUMAN HEALTH AND ECOLOGICAL RISK ASSESSMENTS
- RS 3 SITE REMEDIATION DESIGN, IMPLEMENTATION, AND MANAGEMENT
- RS 4 DEVELOPMENT OF PROJECT MANAGEMENT BEST PRACTICES, TOOLS, SPECIALIZED STUDIES AND ASSOCIATED TRAINING
- RS 5 PROJECT MANAGEMENT SUPPORT INCLUDING RISK MANAGEMENT AND RISK COMMUNICATION
- RS 6 PRE-DESIGN: GEOTECHNICAL DESKTOP STUDY
- RS 7 DESIGN: GEOTECHNICAL STUDIES – FIELD WORK AND REPORTING
- RS 8 SCHEMATIC DESIGN AND DESIGN DEVELOPMENT
- RS 9 CONSTRUCTION DOCUMENTS
- RS 10 TENDER SUPPORT
- RS 11 CONSTRUCTION SUPPORT AND QUALITY ASSURANCE
- RS 12 PEER REVIEW AND PROFESSIONAL SUPPORT
- RS 13 BILINGUAL CONSULTANT REPORTS

GPO 1 GENERAL OBJECTIVES

The following describes required services for various environmental and/or geotechnical projects to be undertaken in the National Capital Area (NCA) during the four (4) year period from the date of issue of the standing offer.

The services rendered will be in support of the Environmental and Geotechnical Services Directorate and Project Delivery / Professional and Technical Services for the Real Property Branch of PWGSC – National Capital Area (PWGSC-NCA) and Headquarters. Individual Call-ups will provide support to a PWGSC Departmental Representative and may include one or more of the Required Services listed in the following section (RS) related to contaminated sites management and geotechnical engineering. Consultants shall be able to provide expertise in all of the Required Services listed in the following section.

Please be advised that, in general, Environmental and Geotechnical engineering services provided to PWGSC must be complete in that they must identify all major issues that will have a significant impact on the project. This will promote a surprise-free environment that will enhance the success of project implementation.

The Canadian Federal Government has implemented a series of initiatives to ensure that sustainable development principles are built into the policy of the federal organizations. Real Property Branch, of PWGSC, has implemented a Sustainable Development Strategy that sets out principles, goals and actions for integrating sustainable development principles into its operations. Consultants will be expected to incorporate sustainable design principles into their project solutions. More information on this topic can be obtained at the following website:

<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/publications/renouvelable-sustainableeng.html>

The types of environmental and geotechnical services that will be required of the Consultant may include, but will not be limited to:

- Phase I Environmental Site Assessments.
- Phase II Environmental Site Assessments.
- Phase III Environmental Site Assessments.
- Human Health and Ecological Risk Assessments.
- Site Remediation/Risk Management Design, Implementation, and Management.
- Development of related Best Practices, Tools, Studies and associated training in support of FCSAP.
- Geotechnical Desktop Studies.
- Geotechnical Studies.
- Geotechnical Support during Design and Construction.
- Peer Review and Professional Support.

General descriptions of each of the types of Required Services listed above are provided in the following section (RS).

PWGSC will Call-up against standing offers for the provision of environmental site assessments and/or geotechnical studies.

(ESAs) of federally owned properties or properties considered for acquisition, to establish their environmental condition.

The ESAs may be conducted for a variety of reasons ranging from Property Transfer Assessments (PTAs), investigation of waste (dump) sites, and potential surface and/or sub-surface contamination caused by fuel storage tank systems or other sources of contamination. Such assessments can include extensive geotechnical, hydrogeological, and possibly archaeological components in the scope of work. If remediation

is to be undertaken, some level of Evaluation of Environmental Effects (EEE) or Environmental Assessment (EA) as prescribed by the Canadian Environmental Assessment Act (CEAA) 2012 will also be required. Depending on the type of facility and scope of remedial efforts, a Designated Substance Survey may also be required. Depending on the type of properties and scope of remedial efforts, a Species at Risk Survey or Management Plan may also be required. If the remediation involves excavation, an understanding of geotechnical requirements in terms of shoring and general excavation management will be needed. For all projects, general expertise in project management will be required with an emphasis on Risk Management including Risk Communication in addition to the typical elements of Integration, Scope, Time, Budget, and Quality.

Environmental site assessments will be conducted in a phased program to identify and to quantify any sources of contamination that may require the implementation of a remedial program. The findings from one phase will indicate whether further evaluation will be required and will aid in designing and implementing the subsequent phase. Each phase may be performed by a different Consultant based on the workload distribution model described in *SP 5*.

Different levels of Human Health and Ecological Risk Assessments will be conducted depending on the specific environmental conditions of the properties. Site remediation/risk management work may also be carried out pursuant to the terms and conditions of the standing offer. This may include activities such as the completion of bench scale or field-scale feasibility studies, the preparation of remedial action plans, the preparation of design drawings and tender packages for remediation projects, and remediation project management services (including site supervision).

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

GPO 1.1 GENERAL SUBMISSION REQUIREMENTS FOR PROJECT DELIVERABLES

Unless otherwise indicated in the Call-up or in the Standing Offer, the Consultant must provide three (3) hard copies of all deliverables, plus one electronic copy in each of the following electronic formats:

1. Original software in which documents, spreadsheets, and models were created in fulfilling contract requirements, e.g. MS Word, NMS Edit, Excel, AutoCAD, ETABS, SAP, etc.
2. Document converted to Portable Document Format (PDF).

All project documents are to be produced and submitted in accordance with pertinent requirements outlined in *ANNEX C – Doing Business*.

GPO 1.2 STANDING OFFER PRINCIPLES

When called upon to provide services, the Consultant must adhere to the following principles at all times.

GPO 1.2.1 Design

1. Maintain a high standard of design as based upon recognized contemporary design philosophies.
2. Maintain consistency and co-ordination between all design elements and disciplines.
3. Specify a quality of material and construction methods that are commensurate with industry standards and with the nature of the facility.
4. Select material and equipment that minimize life cycle costs.
5. Design for flexibility in the immediate and future use of the built asset.

GPO 1.2.2 Sustainable Development

1. Incorporate sustainable development principles into all design elements, such that the associated physical works can be constructed in a sustainable, environmentally responsible manner.
2. Where available, feasible and meet the performance requirements:
 - Specify products that eliminate hazardous materials in their content, manufacture, application, and use.
 - Specify products that make use of post-consumer, or post-industrial recycled materials (such as fly-ash in concrete).
 - Specify products whose production and transportation have a minimized carbon footprint.
 - Specify products which reduce energy usage throughout the life of the building.
 - Design structure to optimize energy efficiency of the building throughout its life.

GPO 1.2.3 Code Compliance

1. ESAs, risk assessment, remediation activities, and geotechnical studies will be carried out in accordance with applicable federal, provincial, and local legislation, and national environmental assessment standards and procedures (i.e. applicable Canadian Standards Association (CSA) and American Society for Testing and Materials (ASTM) standards). Job specific standards required will be specified at time of Call-up.
2. Adhere to the most recent versions of all applicable codes, regulations, by-laws and decisions of "authorities having jurisdiction," with precedence given to those produced at the national level, such as the latest published National Building Code.
3. Where codes, regulations, by-laws and decisions of "authorities having jurisdiction" overlap adhere to the most stringent.
4. Where overlapping codes, regulations, by-laws and decisions of "authorities having jurisdiction" do not clearly have a more stringent requirement, use the requirement given in the federal version unless otherwise directed by the Departmental Representative.

GPO 1.2.4 Quality

1. Maintain a high quality of service by employing contemporary quality management practices, including the use of quality management plans, quality assurance and quality control processes and activities.
2. Ensure all stakeholders are kept informed of and included in all quality management processes.

GPO 1.2.5 Client Relations

Plan project phases and construction activities to minimize disruption and out of service timeframes to client operations.

PA 1 PROJECT ADMINISTRATION

PA 1.1 GENERAL ROLES AND RESPONSIBILITIES

PA 1.1.1 Departmental Representative

The PWGSC Departmental Representative assigned to a particular project:

1. Is the designated Departmental Representative for that project and for any Call-up on the standing offer under that project.
2. Has overall responsibility for the progress of the project, including management administration and coordination of the activities as set out in this document.
3. Is the liaison between the Consultant, PWGSC and Client Departments.

PA 1.1.2 Consultant

The Consultant must:

1. Upon execution of the Call-up, be responsible for producing all work described in the Call-up document, in a conscientious and professional manner.
2. Be responsible for verifying the needs of the client department and incorporating those needs into the required project deliverables.
3. Adhere to all Health and Safety Requirements and provide all Health and Safety submittals as detailed in Annexe A1.
4. Visit the site to perform surveys and obtain local information applicable to the scope of services.
5. Subject to applicable security restrictions, review existing drawings, survey notes, design notes, specifications or reports as required for the performance of the work. All such documents (hard copies, USB keys or DVDs) must be returned to the Departmental Representative on the termination of the contract.
6. Establish and maintain, throughout the duration of each project, a team capable of effectively delivering the services described in this document.
7. Deliver the project within the time frame assigned project budget, and quality in accordance with the approved plan agreed to by the Departmental Representative.
8. The Consultant must coordinate project requirements with any other work or activities that may be underway at a particular project site. This aspect is of particular concern for coordinating project health and safety plans on construction sites.
9. As required, attend or chair project status meetings during the life of a project and prepare and distribute minutes in a timely fashion.
10. Submit regular project progress reports to the Departmental Representative at time intervals determined at the time of the Call-up.
11. When the client requests a change that may alter the scope of work or add to the cost of the project, and/or the cost of services, obtain approval of the Departmental Representative prior to proceeding with the additional work.

PA 1.2 COORDINATION WITH PWGSC

The Consultant must:

1. Carry out services in accordance with approved documents and directions from the Departmental Representative.
2. Correspond only with the Departmental Representative at the times and in the manner dictated by the Departmental Representative. The Consultant shall not communicate with the client department unless so authorized in writing by the Departmental Representative.
3. Ensure all communications carry PWGSC's Project Title, Work Breakdown Structure Element (WBSE), Contract Number, Directory of Federal Real Property (DFRP) number (if applicable), and Federal Contaminated Site Inventory (FCSI) number (if applicable).
4. Advise the Departmental Representative of any changes that may affect schedule or budget or are inconsistent with instructions or written approval previously given. The Consultant shall detail the extent and reasons for the changes and obtain written approval before proceeding. Without advance notification and approval, PWGSC/Client cannot be held liable for charges incurred in excess of approved budget.

PA 1.3 PROJECT RESPONSE TIME REQUIREMENTS

PA 1.3.1 Confirmation of Agreement to Perform the Call-up

The Consultant must be available to discuss the project in detail with the Departmental Representative within three (3) working days from the date the Consultant was advised that his/her firm was selected for the next Call-up. The purpose of the discussion will be to ensure understanding of the specific requirements of the Terms of Reference, and to confirm the Consultant's acceptance of the Call-up. This discussion can happen at a pre-Call-up meeting at the Consultant's request, but would not be considered pre-contractual work.

The Consultant will not be required to attend an Initial Project Meeting, should he/she decide to decline the Call-up before any meeting is held. The Consultant may also decide to decline the Call-up at the time of the Initial Project Meeting. In both cases, the Consultant must confirm his/her acceptance or refusal of the Call-up, in writing to Departmental Representative within three (3) working days or the Call-up will be considered declined.

PA 1.3.2 Project Proposal

The Consultant who has agreed to do the work under the Call-up, shall submit a project proposal to the Departmental Representative by the proposal due date listed in the issued Call-up.

Without being limited to the following, the project proposal must cover all requirements outlined in Section *SP 5 Call-up Procedure*, as well as clearly confirming the defined scope of services, project deliverables and milestones, a project schedule and all other pertinent requirements outlined in this Standing Offer.

The Consultant must be able to demonstrate the availability of adequate resources within his/her proposed team(s) to deliver the scope of services outlined in this Request for Standing Offer in a timely fashion.

PA 1.3.3 Availability during the Course of the Project

For any and all Required Services described in this Standing Offer that may be part of the Call-up, the prime Consultant, and proposed Sub-consultants, must be personally available to attend meetings and respond to inquiries within half (½) a day of the Departmental Representative's request, in the locality of the place of the work from the date the Call-up has been issued until final inspection and turnover.

PA 1.4 PROJECT START-UP MEETING

For any and all Required Services, as described in this Standing Offer, that may be part of the Call-up, a Project Start-up Meeting will be held at the time and place to be determined by the Departmental Representative.

The meeting is intended to facilitate group discussions of the project requirements, and to ensure that all requirements related to the delivery of the project are fully understood.

The meeting introduces key stakeholders involved in the project which, depending on the type of project and the stage of its implementation, may include such people as:

1. PWGSC Representatives (Departmental Representative, QA Engineer(s), Property Manager, etc.).
2. Consultant Representatives (Prime Team Members, Sub-consultants, etc.).
3. Construction Contractor Representatives.
4. Client Representatives.
5. Representatives from other authorities having jurisdiction (NCC, City of Ottawa, provincial departments, etc.).

PA 1.5 OFFICIAL LANGUAGES

This standing offer requires services in both official languages. Refer to "Language Requirements" in the Supplementary Condition section of this Request for Standing Offer document.

PA 1.6 NON-ENVIRONMENTAL AND GEOTECHNICAL ENGINEERING EXPERTISE

At times, the Consultant may be required to engage the services of non-environmental and non-geotechnical engineering specialists, such as construction hydrogeologists, geothermal specialists, municipal or structural engineers, etc. in order to acquire all necessary data to complete the required services.

Contaminant hydrogeological services are part of the required environmental engineering services of this Request for Standing Offer document. Hydrogeological services related to construction design are considered non-environmental and non-geotechnical engineering specialists.

Although the Consultant is not required to identify non-geotechnical or non-environmental engineering disciplines as part of its team, the Consultant must demonstrate, to the satisfaction of the Project Manager, that the discipline specialist being hired is fully competent.

Costs associated with the use of discipline specialists will be billed as a disbursement against the project in accordance with the conditions set out in *TP 10 Disbursement*.

REQUIRED SERVICES

Call-ups may include any or all of the following environmental and/or geotechnical services. The required environmental services will be one or more of the four general types of environmental consulting services detailed in RS 1, RS 2, RS 3 and RS 4 below and involve the prerequisite project management skills identified in RS 5, and RS 13, below. The required geotechnical services will be one or more of the general types detailed in RS 6 through RS 11. The required services listed in RS 12 and RS 13 may be applied to either Environmental or Geotechnical services. Specific services will be identified in each Call-up:

- RS 1 Phased Environmental Site Assessments
- RS 2 Human Health and Ecological Risk Assessments
- RS 3 Site Remediation Design, Implementation, and Management
- RS 4 Development of Project Management Best Practices, Tools, Specialized Studies and National Training
- RS 5 Project Management Support including Risk Management and Risk Communication
- RS 6 Pre-Design: Geotechnical Desktop Study
- RS 7 Design: Geotechnical Studies – Field Work and Reporting
- RS 8 Schematic Design and Design Development
- RS 9 Construction Documents
- RS 10 Tender Support
- RS 11 Construction Support and Quality Assurance
- RS 12 Peer Review and Professional Support
- RS 13 Bilingual Consultant Reports

RS 1 PHASED ENVIRONMENTAL SITE ASSESSMENTS

The environmental site assessments will be carried out primarily in accordance with applicable federal and provincial legislation, departmental policy commitments, and national environmental site assessment standards and procedures. The ESAs will be conducted in a phased approach to identify and quantify any contamination in order to develop a remedial action plan or risk management plan. The findings from one phase will indicate whether further evaluation will be required and will aid in designing and implementing the subsequent phase.

RS 1.1 PHASE I ESAS

This work will comprise the activities outlined in the CSA Phase I Environmental Site Assessment standard (CSA Z768-01). This includes a review of historical records, an interview program, a site visit, and the completion of a summary report. The goal of the work is to identify all areas of potential environmental concern (APECs) spatially on the property related to historical use and to identify the specific contaminants of potential concern (CoPCs) associated with known or suspected sources of contamination. This information is the basis for the design and implementation of an intrusive Phase II ESA program if required.

All work will be as per applicable legislation, protocols, standards and guidelines. The methodology employed shall be in conformance with industry accepted methods and protocols, including but not limited to, those specified by the Canadian Standards Association (CSA Z768-01). The departmental representative shall provide instruction on which regulatory standard the Phase I ESA will be required to meet, the selected standard may be federally or provincially based. The following will be required as part of Phase I ESAs:

1. Review all relevant records information about the site and carry out research to fully understand and document:
 - The location and extents of current and historical activities or infrastructure associated with the site and/or neighbouring properties with the potential to have contaminated the subject property (Areas of Potential Environmental Concern (APECs)).
 - The contaminants of potential concern (CoPCs) associated with the potentially

contaminating activity.

- The site characteristics (i.e. site geology, surface and groundwater, soils, sediments, utilities, services, setting and adjacent land use).
 - The historical basis (including providing references from which an environmental concern was identified, such as a title search record, observation on an air photo, interview results, etc.).
2. Complete an interview program with persons who are familiar with current and past activities on the site as it relates to the identification of areas of potential environmental concern (APECs).
 3. Conduct a site reconnaissance accompanied by persons familiar with the site to identify APECs and any visible signs of potential contamination. The site visit may also entail some preliminary representative sampling (soils, sediments, surface water, and other media) and laboratory testing.
 4. Upon completion of the Phase I components, the Consultant shall prepare a report outlining the findings and recommendations with associated costs, for further assessment in the subsequent phases. This report will clearly outline all areas of concern on the property (in plan drawing), the associated contaminants of concern, and the source of historical information related to the identification of the area of potential environmental concern.

RS 1.2 PHASE II ESAS

This work will generally be based on the findings of the Phase I ESA and will comprise mainly field investigations, consisting of an intrusive sampling and analytical testing program, and potentially geophysical testing. The purpose of the Phase II ESA program is to identify the presence or absence of actual contamination at areas of potential environmental concern (APECs) identified from a previous Phase I ESA. If contamination is not extensive, this program may include delineation of contamination. If this is not possible, however, such delineation activities will fall within the scope of work for a Phase III ESA, if required.

All work will be as per applicable legislation, protocols, standards and guidelines. The methodology employed shall be in conformance with industry accepted methods and protocols, including but not limited to, those specified by the Canadian Council of Ministers of the Environment and the Canadian Standards Association (report Z769-00). The departmental representative shall provide instruction on which regulatory standard the Phase I ESA will be required to meet, the selected standard may be federally or provincially based.

The Consultant may be asked to carry out all or part of the following work depending on environmental issues and site-specific considerations:

1. Based on information obtained in Phase I ESA, design a field program for the site. Methods expected to be used include geophysical surveys, surface sampling, test pitting, soil, surface water, groundwater, or sediment sampling, borehole drilling, installation of groundwater monitoring wells (including well registration in accordance with appropriate regulations), on-site screening tests, installation of soil vapour probes, soil vapour sampling, indoor air quality sampling, analytical testing, and surveying. The program shall provide for evaluation of the site contamination by characterizing the soil, sediment, surface water and groundwater along with characterizing the geologic and hydrogeologic conditions and other relevant environmental components in the most efficient manner possible. This will include, where applicable, the use of field screening techniques to assist in the identification of contamination present. Statistical analysis of on-site screening tests and analytical tests to evaluate the extent of contamination may be required.
2. Upon review and approval of the field program by the PWGSC Departmental Representative,

implement the program to identify the nature and possibly the extent of the contamination on the site.

3. Prepare and submit a laboratory testing program for the representative samples to be collected during the field program. Upon approval of the program, submit the samples for the agreed upon parameter list to the laboratory selected by PWGSC, in keeping with appropriate quality control (QC) protocols approved by the PWGSC Departmental Representative. The samples shall be analyzed according to Canadian Council of Ministers of the Environment (CCME) environmental quality guidelines, as amended from time to time, as well as relevant federal, provincial, and local standards or guidelines, if applicable. The selection of guidelines and standards for numerical comparison of analytical results and for the identification of contaminated sites will be based on a detailed review of land use and will require approval by the PWGSC Departmental Representative.
4. From the results of the detailed investigation and laboratory testing program, the Consultant shall clearly identify all contaminated sites spatially on the property, the associated contaminants of concern, and if possible, extent of impacted media (lateral/vertical distribution of contamination and estimated volume for each media). Consideration shall be given to such factors as potential for migration and off-site contamination. Plans and profiles shall be provided to assist in delineating the contamination and migration patterns, if applicable.
5. Prepare a soil and groundwater management plan to provide guidance and direction to the site owner / user and its contractor on the management of soil and groundwater in accordance with applicable regulations when undertaking construction related activities at the site. The following tasks must be completed as part of the soil and groundwater management plan:
 - Identify and interpret applicable federal and provincial regulations and guidelines which apply to the management of contaminated soil and/or groundwater at site
 - Collect and have analysed soil and/or groundwater samples to allow for appropriate waste characterization of the media
 - Provide recommendations for the re-use of contaminated soil at the site, if applicable
 - Provide recommendations for the management of excess soils from the site, including identification of appropriate waste receiving facilities if applicable
 - Provide recommendations on the importation of clean fill to the site
 - Provide health and safety recommendations for on-site personnel to be followed during the remediation of contaminated soil and/or groundwater.
6. The Consultant shall complete the site classification in accordance with the National Classification System for Contaminated Sites (NCSCS) method (CCME, 2008) or the Aquatic Sites Classification System (ASCS) method (FCSAP, 2014).
7. Where contamination is found to be extensive and the limited field program design and budget are insufficient to delineate the extent of contamination, the consultant shall outline a work plan and budget estimate for a detailed delineation program (i.e. Phase III ESA). The work plan and budget estimate shall outline the number of boreholes, monitoring wells and/or test pits to be advanced, their anticipated termination depths below grade, the number and type (by parameter) of soil and groundwater samples to be collected, and reporting requirements.
8. Prepare a report outlining the results of the evaluations as well as the need for further assessments and their associated budget cost estimates, if required.

Note: Projects may be structured to allow for limited Phase II activities in conjunction of Phase I ESAs.

RS 1.3 PHASE III ESA, MONITORING PROGRAMS, REMEDIAL OPTIONS ANALYSIS, REMEDIAL ACTION PLANS AND RISK MANAGEMENT PLANS

This work will comprise mainly of further sampling and analysis of the subject property based on the results of previous phases, assessment, and reporting of all evaluations conducted. As well, a review of remedial options and selection of the preferred remedial action plan (RAP) or risk management plan (RMP), may be required.

The Consultant may be asked to carry out all or part of the following work depending on environmental issues and site-specific considerations:

1. Prepare a work plan for further investigation based on the recommendations of Phase I and/or Phase II ESA studies. The work plan shall contain complete details of the proposed investigation activities such as, but not limited to, geophysical testing, surface sampling, test pitting, drilling, surveying, on-site testing, analytical testing, etc. The work plan shall include cost estimates, scheduling of work and other relevant information required to complete the delineation of the contamination and to collect sufficient information to confirm the suitability of several feasible approaches to remedy the contamination, including in situ monitoring or risk management. The Consultant will also prepare and submit a laboratory testing program and Quality Assurance (QA) plan for the representative samples to be collected during the field program. The methodology employed shall be in conformance with industry accepted methods and protocols, including but not limited to, those specified by the Canadian Council of Ministers of the Environment and Canadian Standards Association (report Z769-00).
2. Implement the work plan upon approval by the PWGSC Departmental Representative. Upon approval of the laboratory testing program, analyze the samples for the agreed upon parameter list, as discussed in section RS 1.2.c.
3. From the results of the detailed investigation and laboratory testing program, the Consultant shall prepare a report that clearly identifies all contaminated sites spatially on the property, the associated contaminants of concern, and extent of impacted media (lateral/vertical distribution of contamination and estimated volume for each media). The extent of delineation and accuracy of the volumes of contaminated media shall be detailed to the point that an estimate of liability and degree of accuracy can be generated, as described below.
4. The Consultant shall complete/modify the site classification in accordance with the NCSCS method (CCME, 2008) or the Aquatic Sites Classification System (ASCS) method (FCSAP, 2014).
5. Identify and evaluate appropriate remedial measures to remediate the site in accordance with applicable federal, provincial, and local remediation criteria. Optional remedial measures should be identified based on known technology (including sustainable green technologies) and local environmental conditions and sensitivities and the preferred alternative shall be recommended based on various selection criteria, and associated weighting, developed in consultation with the PWGSC Departmental Representative and relevant stakeholders. Costs of various options shall be estimated to assist in the selection of the preferred alternative.
6. Prepare a remedial action plan (RAP) or risk management plan (RMP) for the preferred alternative with an indicative cost estimate for implementation. The indicative cost to implement the remedial action or risk management plan (RAP or RMP) is identified in accordance with the PWGSC Best Practices for the Development and Reporting of Liabilities and Contingent Liabilities Related to Contaminated Sites for Public Works and Government Services Canada (January 2013, updated February 2014), Remediation Liabilities Related to Contaminated Sites: A Supplement to the Financial Information Strategy (FIS) Manual (December 15, 2010), Treasury Board Secretariat Accounting Standard 3.6 - Contingencies (March 20, 2006) and TBS Directive on Contingencies (October 1st 2009). Note that an indicative cost estimate is defined by Treasury Board Secretariat as a low quality, order of magnitude estimate, that would not be considered as a cost objective (i.e., replaces former Class C and D Cost Estimates). The indicative cost estimate will be inclusive of all required activities for the completion of the remedial plan and will list all assumptions used in the development of the estimate. The Consultant shall provide an interpretation of the degree of accuracy (i.e. a range), including a

risk assessment that outlines the areas of uncertainty of the cost estimate and the impact that this uncertainty may have on the estimate.

7. For PWGSC sites, the Consultant should ensure consistency of the Risk Management Plans and Remedial Action Plans with the Best Practices Contaminated Sites Risk Management Protocol (PWGSC, 2003) as well as the most recent Contaminated Sites Management Plan (PWGSC, 2010 and updated versions).
8. For each contaminated site identified, the Consultant will summarize the relevant data required for Federal Contaminated Sites Inventory (FCSI) reporting in tabular format similar to that specified in the DFRP Contaminated Sites Input Guide <http://www.tbs-sct.gc.ca/fcsi-rscf/home-accueil-eng.aspx>

RS 2 HUMAN HEALTH AND/OR ECOLOGICAL RISK ASSESSMENTS

In some cases, PWGSC may require the Consultant to undertake a human health and/or ecological risk assessment for a particular contaminated site. The risk assessment shall be carried out for a site to determine potential human health and/or environmental implications of identified contamination based on the background review and completed field program. The factors to be considered in completing the risk assessments include problem formulation, exposure analysis, toxicity analysis, and risk characterization. The level of detail of the risk assessment (screening level, preliminary or detailed quantitative assessments) will depend on the degree of risk associated with the contaminated site and potential for impact.

The Consultant may be asked to carry out all or part of the following work depending on environmental issues and site-specific considerations:

1. Develop both a site-specific risk assessment (SSRA) work plan and an indicative budget estimate for approval by the PWGSC Departmental Representative. The work shall utilize the information collected on the subject property to develop a detailed site-specific conceptual model which includes such factors as analysis of the hazard of contaminants of concern, receptor identification, exposure pathways, prediction of contaminant concentrations at receptor locations, toxicity estimates, and an interpretation of the ecological or human health effects and the degree of uncertainty. This information shall then be used to determine whether the contaminant of concern presents a risk to the receptors and recommended alternatives to mitigate this risk.
2. As part of the risk assessment process, the Consultant may propose, and be authorized to complete, additional fieldwork or necessary monitoring to verify that the assumptions used in the risk assessment are valid, and that there are not unacceptably high risks to receptors.
3. Develop site-specific soil quality remediation objectives for the subject property and/or provide a risk management plan that would involve managing the contamination in place based on the risk assessment results. The development of risk-based, site-specific cleanup objectives in accordance with accepted methodologies, including but not limited to, guidance documents listed under FCSAP, the CCME, HC and EC such as "Guidance Manual for Developing Site-Specific Soil Quality Remediation Objectives for Contaminated Sites in Canada" (CCME, 1996), "A Protocol for the Derivation of Environmental and Human Health Soil Quality Guidelines" (CCME, 2006), "A Framework for Ecological Risk Assessment: General Guidance" (CCME, 1996), FCSAP Guidance on Human Health Risk Assessment, Parts I to VII, (Health Canada), FCSAP Ecological Risk Assessment Guidance (Modules 1 to 4, Environment Canada) and other relevant guidance documents and updates.
4. The Consultant shall either include the results of the risk assessment within the same document as the subsurface investigation findings or present it as a separate standalone document, as determined by the PWGSC Departmental Representative.

RS 3 SITE REMEDIATION DESIGN, IMPLEMENTATION AND MANAGEMENT

PWGSC may require the consultant to coordinate, supervise, or undertake environmental remedial / risk management projects. The types of projects in this category may include conducting or supporting the supervision of soil, groundwater, surface water, soil vapour or sediment remediation projects.

Consultants may be asked to carry out all or part of the following work depending on environmental issues and site-specific considerations:

1. The Consultant shall develop and prepare a Site Remediation Plans and Specifications utilizing information collected during phased assessments and remedial action plans (preliminary design concepts) of the subject property. This may include completing bench or field scale pilot studies of the preferred remedial alternative to verify the effectiveness of the design prior to proceeding with remediation. The Site Remediation Plans and Specifications shall clearly define the specific work activities associated with the remediation program. This specification document, prepared in accordance with the current National Master Specifications, will be used by PWGSC to solicit bids from contractors and will specify the contractors' duties and responsibilities during the project and the basis for payment. This document shall also include a detailed Health and Safety Plan for all aspects of each project.
2. The Consultant will prepare a substantive cost estimate and cost breakdown for the remediation project as well as a proposed schedule with appropriate milestones. Note that the substantive cost estimate is to be in elemental cost analysis format latest edition issued by the Canadian Institute of Quantity Surveyors and based on design development drawings and outline specifications, which include the design of all major systems and subsystems, as well as the results of all site/installation investigations
3. In support of the development and implementation of remedial action plans, the Consultant may be required to complete an Evaluation of Environmental Effects (EEE) or an Environmental Assessment (EA) in accordance with the Canadian Environmental Assessment Act (CEAA) 2012.
4. If the remedial action plan involves soil excavation, the Consultant may be required to conduct geotechnical studies to confirm the requirements for the safe and responsible excavation of soils including shoring and soil hoarding requirements.
5. The Consultant may be required to identify specialized technical assistance on a project-specific basis. For example, certain projects may involve screening for unexploded ordnance (UXO), and nuclear, biological, chemical (NBC) agents during the ESA or remediation.
6. The Consultant may be required to assist PWGSC during the tendering process. This work may include: assisting the Real Property Contracting Directorate in preparing responses to bidder inquiries, attending bidder meetings to clarify project requirements, conducting site inspections with bidders during the tendering period, and assisting in the evaluation of bid packages.
7. The Consultant may be responsible for on-site supervision as PWGSC's Representative during all remedial activities to ensure that the Contractor is completing work in accordance with the Site Remediation Plan and Health and Safety Plan. This includes maintaining quality, budget, and schedule control using Earned Value Analysis and recording all necessary activities in accordance with the measurement for payment. This may also include completing on-site screening, sampling, and analysis to guide the contractor in its remediation activities and completing the necessary confirmatory sampling and on-site surveying and field measurements to document the completion of the work and that remedial objectives have been satisfied. This work may also include issuance of interim and final certificates of completion of the remediation work and collection or preparation of as-completed drawings. The Consultant will remain available to meet contractors and with PWGSC to discuss the progress or results of remediation projects.
8. To document completion of remediation activities, the Consultant will complete, sign, and stamp a Record of Site Condition as developed by the Ontario Ministry of the Environment Conservation and Parks for sites identified for divestiture within the Province of Ontario and an

equivalent document for sites identified for divestiture in the Province of Quebec. For sites that are to remain within the NCA federal inventory, the Consultant will complete, sign, and stamp a modified Record of Site Condition as developed within the draft Contaminated Sites Risk Management Best Practices (PWGSC, 2003).

9. The Consultant shall complete written reports summarizing the remediation work completed. The extent of the work as well as all site restoration activities are to be documented. The remediation reports are to contain plan and profile drawings illustrating the locations of verification samples and documenting that the environmental quality of remediated media remaining in place following remedial work is below remediation objectives as defined in the project scope of work or they shall contain details of a risk management plan for any contamination remaining on site. The report will identify the receiving facilities for any materials transported off-site and provide appropriate backup documentation (i.e., weigh bills, certificates of destruction, sewer surcharge agreements, etc.).
10. The Consultant shall develop and execute sampling programs, as required, for ongoing monitoring of various impacted media related to risk management plans for contamination remaining in place following a remediation program. The abandonment of obsolete monitoring wells may also be required, in accordance with appropriate regulations and the Monitoring Well Decommissioning Model (final draft) developed by Franz Environmental Inc. and Cushman-Ball (Environment Canada, 2002).

RS 4 DEVELOPMENT OF PROJECT MANAGEMENT BEST PRACTICES, TOOLS, SPECIALIZED STUDIES AND NATIONAL TRAINING

The Consultant may be called upon to provide support to PWGSC in relation to its Expert Support function within the Federal Contaminated Sites Action Plan (FCSAP). Currently, in its role as FCSAP Expert Support, PWGSC is charged with the preparation and management of project management tools related to contaminated site remediation and associated training. PWGSC is also responsible for the development of solutions to procurement challenges (including, but not limited to, social procurement, Indigenous opportunities, small and medium enterprises), the collection and sharing of information on innovative/sustainable/green remediation technologies, and industry liaison to ensure that the private sector is aware of anticipated federal needs for contaminated site services. PWGSC also provides support to the three sciences based expert support departments and to the FCSAP Secretariat to conduct studies related to contaminated sites management and associated training. Previously, this work has entailed stakeholder engagement (including facilitated workshops and direct consultation) and expert analysis followed by the preparation and sharing of best practices, tools and training specifically related to contaminated site management through presentations to the Contaminated Sites Management Working Group, the Interdepartmental Regional Working Groups, the Regional Integrated Planning Boards and other federal forums (e.g., Federal Contaminated Sites National Workshop) to promote awareness of these best practices within the federal community. The successful Consultants will need to demonstrate expertise in the management of contaminated site projects and programs, the preparation of specialized studies related to contaminated sites as well as the development and delivery of best practices, tools and training related to contaminated sites, preferably within the federal context.

RS 5 PROJECT MANAGEMENT SUPPORT INCLUDING RISK MANAGEMENT AND RISK COMMUNICATION

Integral to the foregoing specific technical environmental project requirements, the Consultant will be required to demonstrate strong project management expertise. Project management skills that will be drawn upon during the execution of Call-ups under the Standing Offer will primarily include: Integration, Scope, Schedule, Budget, Quality, and Risk. Although the former five-management skills are self-evident, the Risk Management skill set is imperative in the successful completion of contaminated sites management due to the sensitive nature and uncertainties associated with these projects.

The Consultant may be requested to develop a Risk Management Plan for complex projects. The Risk Management Plan would identify the schedules for key deliverables, the inputs required from key

stakeholders, and the impact of delays to the budget, schedule, and quality. The Risk Management Plan would be clearly communicated to the identified key stakeholders, from which input is required, during the project initiation meeting.

The Consultant may also be required to assist in the development of Risk Communication Plans. The Risk Communication Plan will identify the primary spokesperson through which communications would be channelled, the key stakeholders to be kept informed, and the timing and types of information to be released and the methods to be used in information dissemination during the life of the project. The Risk Communication Plan would be created in conjunction with PWGSC Communications personnel or Client Department Communications personnel, as applicable.

RS 6 PRE-DESIGN: GEOTECHNICAL DESKTOP STUDY

Geotechnical Desktop Study will be carried out in accordance with applicable standards and industry best practices. The Desktop Study is the preliminary phase of a project that reviews existing documentation to assess project feasibility at a preliminary level. The Desktop Study can be used as a site selection tool, and to identify missing project information, viability, and limitations as well proposing a complete geotechnical study program (field works, lab testing and reporting) for the implementation of the proposed infrastructures of the project.

RS 6.1 DESKTOP STUDY

The Consultant must:

1. Identify, obtain, review, provide interpretation and analyze existing documents, publications and reports pertinent to the project and/or to the site(s) from PWGSC, public domain, Consultant's record or any other available sources, such as:
 - Geotechnical reports or any other past studies.
 - Construction Drawings.
 - Geological information, maps and sections.
 - Topographic Maps.
 - Geological risks (landslides, slope stability, etc.).
 - Aerial Photographs.
 - Seismic Data and Maps.
 - Localisation Plans. etc.
2. Identify local, provincial, national authorities having jurisdiction.
3. Identify all applicable codes, regulations and standards.
4. Identify any specific regulations, bylaws, etc. that apply to the site (eg. Landslide zones, flood-prone areas).
5. Identify any missing information needed to complete the project as outlined in the project background.
6. If required, propose a complete geotechnical study program (field works, lab testing and reporting) for the implementation of the proposed infrastructures or the site needs of the project.

RS 6.2 DESKTOP STUDY REPORT

The Consultant must prepare and submit to the Departmental Representative for approval, a report that includes:

1. An Introduction :
 - Project Terms of Reference.
 - Project Objectives.

- Project context.
 - Scope of Work.
2. Detailed Description of the Proposed site(s):
 - Location.
 - Geology.
 - Hydrogeology/Hydrology.
 - Topography.
 - Vegetation.
 - Physical Constraints.
 - Presence or absence of existing structures or buildings.
 - Presence or absence of wetlands.
 - Slope stability issues.
 - Photographs, etc.
 3. A review of existing documents, publications and reports pertinent to the project and/or to the site(s) from PWGSC, public domain, Consultant's records or any other available sources.
 4. Summary of the geotechnical and geological conditions as well as particularities of the proposed site(s) based on available information.
 5. Summary must include plans and sections as required to present the information in a clear and concise manner.
 6. Discussion on the viability of the project, the advantages and disadvantages of the proposed site(s), and the degree to which the site(s) meets the requirements of the project.
 7. Project limitations.
 8. Any applicable restrictions for site development including both natural hazard and regulatory limitations.
 9. Where used as a site selection tool a ranking of sites with relevant parameters must be provided.
 10. Missing information that may be relevant to the project.
 11. A complete geotechnical study program (field works, lab testing and reporting).

All relevant documents, publications and reports used for the desktop study must be attached in annex.

Copies of all Pre-design Documents must be provided in PDF format. All plans and sections must be provided in DWG and PDF format. The report and logs must be referenced to geospatial reference framework agreed by PWGSC.

RS 7 DESIGN: GEOTECHNICAL STUDIES – FIELD WORK AND REPORTING

Where applicable the geotechnical field work must be undertaken in conjunction, and coordinated with any field work required for Phase II or III ESA in order to minimize site disturbance and achieve project efficiencies.

All reporting must be provided under separate cover from the environmental reporting.

RS 7.1 PRELIMINARY GEOTECHNICAL STUDY

A Preliminary Geotechnical Study can be undertaken to validate data that has been collected in previous studies. This study collects basic geotechnical information in order to validate the site conditions prior to the next steps of the project, or as a site selection tool. A preliminary study will typically include some intrusive field work and/or testing.

RS 7.1.1 Existing Data

The Consultant must identify, obtain, review, interpret and analyze existing data in accordance with *RS 6.1 Desktop Study* unless a Desktop Study has already been completed. In the case in which a Desktop Study has been completed a summary of the pertinent results must be included within the preliminary report, and background data included within the annex.

RS 7.1.2 Data collection and analysis

The Consultant must:

1. Conduct site(s)'s reconnaissance prior to the work to verify access and physical constraints, take photographs, locate boreholes, etc..
2. Determine with existing data, site(s)'s historic and observations made during site's visit(s), the optimal location of the proposed soundings provided in the *Terms of Reference*.
3. Revise proposed work plan in the *Terms of Reference* to ensure that it meets the requirements of the project and, if required, proposed any supplementary fieldwork, lab testing, etc. to meet these requirements.
4. Request any access to property(ies) or site(s) and all required documents through PWGSC before doing any work.
5. Retain the services of a specialized subcontractor to undertake the locating of all public and private underground services in order to identify the location of all underground services in the proposed work area(s) before doing any work. A copy of the location report must also be provided to PWGSC.
6. Perform site(s)'s reconnaissance, inspections, surveys, measurements, studies, tests, evaluations, etc. necessary to obtain all relevant data to meet the *Terms of Reference*.
7. Interview operational personnel and occupants/users, as required, to confirm operational and functional requirements.
8. For existing structures expected to be impacted by the proposed work, analyze all pertinent project data to:
 - Assess condition and performance the foundation members, retaining structures, underground structures, etc., of the asset, as well as the proposed projects impact on its functionality.
 - Respond to specific requirements (e.g.: determine causes of technical problems, confirm structural integrity of foundation members, retaining structures, underground structures, assess seismic resistance, etc.).
9. Leave the site(s) in near-found condition and backfill boreholes as per industry best practices to prevent any accident or environmental contamination.

RS 7.1.3 Technical Report

The Consultant must prepare and submit to the Departmental Representative for approval, a technical report that:

1. An Introduction :
 - Project Terms of Reference.
 - Project Objectives.
 - Project context.
 - Scope of Work.
2. Detailed Description of the Proposed site(s):

- Location.
 - Geology.
 - Hydrogeology/Hydrology.
 - Topography.
 - Vegetation.
 - Physical Constraints.
 - Presence or absence of existing structures or buildings.
 - Presence or absence of wetlands.
 - Slope stability issues.
 - Photographs, etc.
3. A review of existing documents, publications and reports pertinent to the project and to the site from PWGSC, public domain, consultant records or any other available sources. Previous laboratory and borehole reports must be presented in annex.
 4. Description of field investigation, drilling and sampling, and in situ tests.
 5. Describes the approach and results of investigations, studies, inspections, surveys, measurements, evaluations.
 6. Summary of the geotechnical and geological conditions as well as particularities of the proposed site(s) based on available information.
 7. Groundwater monitoring results.
 8. Summary of laboratory test results.
 9. Presents the results of all data analyses and compliance verification.
 10. Summary must include plans and sections as required to present the information in a clear and concise manner.
 11. Discussion on the viability of the project, the advantages, disadvantages and the constraints of the proposed site(s), and the degree to which the site meets the requirements of the project.
 12. Project limitations.
 13. Recommendations relating to methods of construction, including options where viable.
 14. Any applicable restrictions for site development such as construction requirements, natural hazards and regulatory limitations.
 15. Where used as a site selection tool a ranking of sites with relevant parameters must be provided.
 16. Identifies a minimum of 3 options or alternative remedial measures for major items where applicable, to deal with deficiencies and meet project requirements.
 17. Describes, in broad terms, the pros and cons of each option and how well each one responds to project requirements.
 18. Provides Class "D" estimates (order of magnitude) of engineering and construction costs, including life-cycle costs, associated with each option.
 19. Describes, in broad terms, project scheduling implications associated with each option.
 20. Provides recommendations on next steps, and prepares a program for future detailed geotechnical investigation if required.
 21. Missing information that may be relevant to the project.
 22. Site plan with borehole locations for this project and all others presented reports.
 23. Graphical log of the boring, to scale and elevation, showing the vertical distribution of materials, their basic description, piezometers and standpipes installation sketch with water levels, summarized test results and boundaries.

24. Copies of laboratory test reports.
25. Rock core photographs.
26. Complete citations for all sources of information used in the work.
27. Other geotechnical information to meet the objectives of the project.

Copies of all Design Documents must be provided in PDF format. All plans and sections must be provided in DWG and PDF format. The report and logs must be referenced to geospatial reference framework agreed by PWGSC.

RS 7.2 DETAILED INVESTIGATION

A detailed investigation is considered the final investigation that will obtain all required information to proceed with detailed design and construction. This study collects all required geotechnical information in order to validate the site conditions. This study may build on existing work or could be carried out on a standalone basis. A detailed investigation will typically include intrusive field work and/or testing.

Reporting must include two separate reports, as follows:

- 1) Geotechnical Data Report (GDR) which includes all factual data, including all field and laboratory testing results.
- 2) Geotechnical Design Memorandum (GDM) which includes all design recommendations.

In some cases, a Geotechnical Baseline Report (GBR) may also be required.

RS 7.2.1 Existing Data

The Consultant must identify, obtain, review, interpret and analyze existing data in accordance with *RS 6.1 Desktop Study* unless a Desktop Study or Preliminary Study has already been completed. In the case in which Desktop Study or Preliminary Study has been completed a summary of the pertinent results must be included within the report, and background data included within the annex.

RS 7.2.2 Data collection and analysis

1. Conduct site's reconnaissance prior to the work to verify access and physical constraints, take photographs, locate boreholes, etc.
2. Determine with existing data, site's historic and observations made during the site's visit, the optimal location of the proposed soundings provided in the *Terms of Reference*.
3. Revise proposed work plan in the *Terms of Reference* to ensure that it meets the requirements of the project and, if required, proposed any supplementary fieldwork, lab testing, etc. to meet these requirements.
4. Request any access to property or site and all required documents through PWGSC before doing any work.
5. Retain the services of a specialized subcontractor to undertake the locating of all public and private underground services in order to identify the location of all underground services in the proposed work area before doing any work. A copy of the location report must also be provided to PWGSC.
6. Perform site's reconnaissance, inspections, surveys, measurements, studies, tests, evaluations, etc. necessary to obtain all relevant data to meet the *Terms of Reference*.
7. Interview operational personnel and occupants/users, as required, to confirm operational and functional requirements.

8. For existing structures expected to be impacted by the proposed work, analyze all pertinent project data to:
 - Assess condition and performance the foundation members, retaining structures, underground structures, etc., of the asset, as well as the proposed projects impact on its functionality.
 - Respond to specific requirements (e.g.: determine causes of technical problems, confirm structural integrity of foundation members, retaining structures, underground structures, assess seismic resistance, etc.).
9. Leave the site(s) in near-found condition and backfill boreholes as per industry best practices to prevent any accident or environmental contamination.

RS 7.2.3 Technical Report, Options and Cost Estimates

The Consultant must prepare and submit to the Departmental Representative for approval, a technical report separate as follows:

- 1) Geotechnical Data Report (GDR) describing and summarizing the factual findings, including the following:
 1. An Introduction :
 - Project Terms of Reference.
 - Project Objectives.
 - Project context.
 - Scope of Work.
 2. Detailed Description of the Proposed site:
 - Location.
 - Geology.
 - Hydrogeology/Hydrology.
 - Topography.
 - Vegetation.
 - Physical Constraints.
 - Presence or absence of existing structures or buildings.
 - Presence or absence of wetlands.
 - Slope stability issues.
 - Photographs, etc.
 3. A review of existing documents, publications and reports pertinent to the project and to the site from PWGSC, public domain, consultant records or any other available sources. Previous laboratory and borehole reports must be presented in annex.
 4. Description of field investigation, drilling and sampling, and in situ tests.
 5. Describes the approach and results of investigations, studies, inspections, surveys, measurements, evaluations.
 6. Summary of the geotechnical and geological conditions as well as particularities of the proposed site based on available information.
 7. Groundwater monitoring results.
 8. Summary of laboratory test results.
 9. Presents the results of all data analyses and compliance verifications.
 10. Summary must include plans and sections as required to present the information in a clear and concise manner.

11. Site plan with borehole locations for this project and all others presented reports.
 12. Graphical log of the boring, to scale and elevation, showing the vertical distribution of materials, their basic description, piezometers and standpipes installation sketch with water levels, summarized test results and boundaries.
 13. All factual information including any additional information from the field and laboratory work.
 14. Copies of laboratory test reports.
 15. Rock core photographs.
 16. Profile of vertical shear and compressive wave velocities.
 17. A copy of the NBCC Seismic Hazard Calculation for the site (spectral accelerations).
 18. Complete citations for all sources of information used in the work.
 19. Other geotechnical information to meet the objectives of the project.
- 2) Geotechnical Design Memorandum (GDM) which includes all design recommendations. It should be read in conjunction with the GDR but is to be provided as a separate standalone document.
1. Provides recommendations for input to the design of the specified built works including but not limited to:
 - Type of foundations and optimum founding elevation.
 - Bearing capacity for shallow and deep foundations and an estimate of the settlement.
 - Methods of structure installations.
 - Frost protection.
 - Detailed description of the foundations of the existing building(s) and their elevation.
 - Stabilization of existing foundation members (e.g. underpinning).
 - Excavation in soils and rocks and any limitations due to adverse soil/rock conditions.
 - Lateral support parameters for earth retaining structures.
 - Mitigating effects of excavation on adjacent structures.
 - Pavement design of roads and parking lots.
 - De-watering of excavations.
 - Slope stability (in soils and rocks).
 - Seismic parameters including site class.
 - Liquefaction potential.
 - Soil stabilization/improvement.
 - Use of excavated material as backfill.
 - Vibration limits for excavation and construction activities.
 - Drainage.
 - Soil compaction.
 - Geotechnical monitoring and Instrumentation.
 - Soil resistivity for corrosion protection of underground metals and electrical grounding design.
 - Potential for pyrite induced heave within bedrock including remediation measures.
 - Specific restrictions to site development such as sensitive soils, expansive clays, etc.
 2. Identifies a minimum of 3 options or alternative remedial measures where applicable for items such as foundation options, or excavation approach and/or shoring.
 3. Describes, in broad terms, the pros and cons of each option and how well each one responds to project requirements.
 4. Provides Class "D" estimates (order of magnitude) of engineering and construction costs, including life-cycle costs, associated with each option.
 5. Describes, in broad terms, project scheduling implications associated with each option.

3) Geotechnical Baseline Report (GBR):

The Geotechnical Baseline Report (GBR) is a report that defines various ground conditions across a project site. The GBR is typically provided as part of the contract, whereby it sets the range of adverse physical ground conditions that ought to be provided for and included in the contract price. The GBR is typically used to provide a defined set of common values for all contractors to use in preparing a bid price, and serves as a benchmark against which to measure changed site conditions. The determination of the values (i.e. a large or small range for a certain parameter) allows the owner to quantify and shift risk from the bidder to the owner, or vice versa.

The parameters and values or ranges provided are determined in consultation with the project team but are expected to include all parameters which impact the contractor's ability to proceed with the work, such as water levels, subsurface conditions, bedrock quality and strength, hydraulic parameters, etc.

Copies of all Design Documents must be provided in PDF format. All plans and sections must be provided in DWG and PDF format. The report and logs must be referenced to geospatial reference framework agreed by PWGSC.

RS 7.3 SPECIAL STUDIES

The Consultant must as required conduct special studies such as:

- Dynamic Analysis for ground/foundation response.
- Numerical analysis of stresses and deformations (2-D and 3-D) in foundations / slabs / embankments.
- Site-specific seismic analysis and liquefaction assessment.
- Slope stability Study (with and without a seismic event).
- Geothermal Study.
- Geophysical Study.
- Hydrology/Hydrogeology Study.
- Geotechnical Monitoring Systems.

The Consultant must prepare and submit to the Departmental Representative for approval, a technical report that contains all services as in *RS 7.2.3 Technical Report, Options and Cost Estimates* applicable to the special study.

RS 8 SCHEMATIC DESIGN AND DESIGN DEVELOPMENT

As directed by the Departmental Representative, the work below will typically **be in support of other consultants contracted separately** with the Departmental Representative as the project proceeds into the schematic and design stage. It would be expected that the various options and recommended options must have been provided previously within the Geotechnical Design Report(s) and Memorandum(s).

Reporting must consist primarily of drawings, or edits to drawings by others, specifications and/or edits to specifications and/or technical memorandums.

RS 8.1 SCHEMATIC DESIGN

RS 8.1.1 General Requirements

The Consultant must review Pre-Design Documents, further analyze options and assist in the preparations of Schematic Design Documents in sufficient detail to:

1. Confirm the feasibility of the project.
2. Translate the Project Requirements into design parameters.
3. Provide a thorough exploration of the technical options.
4. Analyze each option with regard to project goals, including cost and schedule.
5. Develop preliminary Construction Cost Estimates (Class 'C') and Project Implementation Schedule for the geotechnical portion of the project.
6. Recommend / confirm an option for further Design Development.

RS 8.1.2 Option Analysis

The Consultant must:

1. Review the options identified in Pre-design stage and recommend, for the Departmental Representative's approval, any other option that should be explored and analyzed further.
2. For each option to be further explored, as confirmed by the Departmental Representative:
 - Complete a detailed analysis that describes how the option responds to project requirements, environmental issues, and sustainability.
 - Explore possible technical and environmental strategies which are viable and have potential for development.
 - Identify and quantify potential risks and make contingency recommendations in order to minimize negative cost impacts.
 - Advise on alternative procurement and construction strategies to create efficiencies wherever possible.
 - Produce Class "C" cost estimates for the various options, including life-cycle costs for the geotechnical portion of the project.
 - Assess the impacts the option may have on the Project Implementation Strategy and Schedule including constructability, project phasing and duration.
3. Recommend one option for further Design Development with all supporting background and technical justifications.

RS 8.1.3 Schematic Design Deliverables

The Consultant must prepare and submit to the Departmental Representative for approval:

1. Submit copies of construction documents, in the type and number specified in *GPO 1.1 General Submission Requirements for Project Deliverables*.
2. A detailed option analysis report covering the elements outlined in *RS 8.1.2 Option Analysis*.
3. Schematic design drawings (or input onto drawings by others) of geotechnical elements including: plan views, elevations, foundations, sections, explanatory sketches and notes, analytical diagrams, etc.
4. Class "C" estimates of engineering and construction costs, as well as life-cycle costs, associated with each option for the geotechnical portion of the project.
5. Assistance in a preliminary Project Implementation Strategy and Schedule that include, without being limited to, such elements as:
 - Key activities and milestones including critical deadlines, delivery items requiring long lead

time, etc., that are required for the effective delivery of the project deliverables.

- Time frames for submissions, reviews and approvals.
- The co-ordination with work of other disciplines (architectural, mechanical engineering, etc.).
- An assessment of the impacts the various options may have on Project Implementation Strategy and Schedule including constructability, project phasing and duration.

RS 8.2 DESIGN DEVELOPMENT

As directed by the Departmental Representative, the work below will sometimes **be in support of other consultants contracted separately** with the Departmental Representative.

RS 8.2.1 General Requirements

Based on the approved Pre-Design Documents, the Consultant is required to provide geotechnical support to further develop one of the options presented at the Pre-Design stage. The Departmental Representative will confirm in writing the option for which Design Development is required.

The Consultant must review Pre-Design Documents and provide geotechnical support to the design of the option approved by the Departmental Representative, to the level of detail necessary to:

1. Define the scope, the intent and the character of the entire project.
2. Update the Cost Estimates.
3. Facilitate design reviews, discussions and decisions.
4. Present, as required, the design to government officials, to Clients, or to any other authorities having jurisdiction.
5. Obtain the necessary approvals from all stakeholders and the Departmental Representative to proceed to the development of Construction Documents.

RS 8.2.2 Design Deliverables

The Geotechnical Consultant is to assist the Main Consultant (contracted separately) in the preparation and submission of the following deliverables, to the Departmental Representative for approval:

1. Submit copies of construction documents, in the type and number specified in *GPO 1.1 General Submission Requirements for Project Deliverables*.
2. Design development drawings as further described under *RS 8.2.3 Design Development Drawings*.
3. A list of all National Master Specifications (NMS) sections to be used.
4. A Class "B" Construction Cost Estimate based on the Design Development Documents.
5. An updated Cost Plan including an assessment of potential project risks and mitigation measures.
6. Presentation material needed to obtain any design approvals that may be required from government officials, Clients, or any other authorities having jurisdiction.
7. A detailed Project Implementation Strategy and Schedule that includes, without being limited to, such elements as:
 - Key activities and milestones including critical deadlines, delivery items requiring long lead time, etc., that are required for the effective delivery of the project deliverables.

- Time frames for submissions, reviews and approvals.
- Co-ordination with work of other disciplines, as applicable (architectural, mechanical engineering, etc.).
- Constructability assessment and advice on construction strategy and duration.
- Recommendations on project phasing.

RS 8.2.3 Design Development Drawings

Without being limited to the following, Design Development Drawings must:

1. Include all recommendations and design requirements outlined in the final Geotechnical Data Report and Geotechnical Design Memorandum prepared specifically for the project and be identified as such.
2. Include plans, elevations, sections and perspective views of all foundation elements and support systems for rock excavation (underground and open) to be detailed in Construction Drawings.
3. Indicate modifications to existing structures or new structural systems, types of foundation, new construction materials and all other pertinent details.
4. Identify geotechnical constraints that may affect construction.
5. Present, in the general notes, a summary of the results of any earthquake resistance assessments that may have been made, as well as actions included in the design to improve earthquake resistance.
6. Include, as required, supporting drawings from other disciplines that may affect the geotechnical design development (e.g. architectural).

RS 9 CONSTRUCTION DOCUMENTS

As directed by the Departmental Representative, the work below will typically **be in support of other consultants contracted separately** with the Departmental Representative as the project proceeds into the construction document stage.

RS 9.1 STAGES OF DOCUMENT PREPARATION

Based on the approved Design Development Documents, the Consultant is required to assist in the preparation of Construction Documents including drawings, specifications, cost estimates, risk management plans, and schedules. Submissions will be reviewed and approved by the Departmental Representative.

Reporting must consist primarily of drawings, or edits to drawings by others, specifications and/or edits to specifications and/or technical memorandums.

Stages of Construction Document preparation are defined as follows:

1. 33% indicates technical completeness of all working documents, and as a minimum include.
 - Submission of all NMS sections to be used including initial editing of specification sections. Provide a summary list of specification sections and indicate the degree to which the individual specification section has been edited, i.e. unedited, partially edited, fully edited.
 - Construction drawings, as a minimum, to be advanced so that all major drawing layouts (plan and profiles) are established, key details and sections indicated.

2. 66% indicates substantial technical development of the project - well advanced engineering plans, details, schedules and specifications.
3. Further advancement of all NMS sections, including but not limited to:
 - All SPEC notes removed,
 - Majority of references updated,
 - Removal of all terminology other than Departmental Representative,
 - Removal of all duplication and conflicting information within and between specifications,
 - Partial and final editing of respective specification sections technical content.
4. Provide summary list of all specification sections and indicate the degree to which the individual specification section has been edited, i.e. partially edited or fully edited.
5. 99% is the submission of complete Construction Documents ready for final technical reviews and approvals.
 - The level of completeness should be such that the specifications and drawings are essentially "ready for tender" save for the final signing and sealing of the documents.
6. Final Submission incorporates all revisions required in the 99% review and is intended to provide PWGSC with complete Construction Documents for tender call.

RS 9.2 DOCUMENT DEVELOPMENT AND REVIEWS (ALL STAGES)

The Consultant must, for each document preparation stage described in *RS 9.1 Stages of Documents Preparation* related to the geotechnical portion of the project:

1. Prepare and submit, an updated Cost Plan including updates to Construction Cost Estimates, Risk Management Plan, and Project Schedule.
2. Submit copies of construction documents, in the type and number specified in *GPO 1.1 General Submission Requirements for Project Deliverables*.
3. Provide written response to all review comments and incorporate them, as appropriate, into subsequent stages of Construction Documents.
4. Ensure all construction documents are coordinated with documents from other disciplines, or sub-consultants that may be involved in the project.
5. Attend technical and production meetings that may be arranged by Departmental Representative or the Consultant, for the review of construction documents at the 33%, 66%, and 99% stages. Prepare minutes of the meetings and distribute copies to all participants.
6. Submit plans and specifications at the appropriate stages, and obtain approvals from Authorities having jurisdiction (e.g. municipal or provincial governments, etc.).
7. Clarify any special project implementation strategies (e.g. phased construction).

RS 9.3 FINAL CONSTRUCTION DOCUMENT SUBMISSION

The Geotechnical Consultant is to assist the Main Consultant (contracted separately) in the preparation and submission, to the Departmental Representative for approval, in accordance with these requirements:

1. Complete sets of final construction drawings and specifications, in both official languages, unless otherwise specified.
2. Submit copies of construction documents, in the type and number specified in *GPO 1.1 General Submission Requirements for Project Deliverables*.

3. A final Construction Cost Estimate (Class "A") based on the approved construction documents, together with a cost breakdown.
4. An updated Project Schedule.
5. A Risk Management Plan to cover the construction phase of the project.

RS 10 TENDER SUPPORT

As directed by the Departmental Representative, the work below will typically **be in support of other consultants contracted separately** with the Departmental Representative.

RS 10.1 TENDER DOCUMENTS

The Departmental Representative must be responsible for the production of the required number of copies of the tender documents, and for such other documents as are necessary for tender call purposes. After acceptance of the final submission of the Construction Documents by the Departmental Representative, the Geotechnical Consultant is to assist the Main Consultant (contracted separately) in the preparation and deliverable of the following:

1. Three (3) complete sets of the approved tender drawings: one (1) hard copy (signed and sealed) and two (2) electronic copies (one in native format and one in PDF format) .
2. Three (3) sets of the approved specifications, two (2) electronic copies (one in native format and one in PDF format) and one hard copy properly bound and covered.
3. The above tender drawings and specifications in both official languages.

RS 10.2 TENDER CALL

The Consultant must:

1. Provide the Departmental Representative with all information required by tenderers to fully interpret the Construction Documents related to the geotechnical portion of the project.
2. Attend tenderers briefing meeting(s) (i.e. Job Showing), upon request.
3. Prepare addenda based on questions arising in such meetings for issue by the Contracting Authority. The Contracting Authority will issue the addenda to all participants.
4. Keep full notes of all inquiries during the bidding period and submit them to Departmental Representative at the end, for PWGSC records.

RS 10.3 BID EVALUATION AND CONSTRUCTION CONTRACT AWARD

The Contracting Authority must be responsible for assembling and issuing tender documents and arranging for the receipt of tenders and awarding of the Construction Contract.

The Consultant must assist tender evaluation by providing geotechnical advice on such elements as:

1. The completeness of tender documents in all respects.
2. The technical aspects of the tenders.
3. The effect of alternatives and qualifications which may have been included in the tender.
4. The tenderers capability to undertake the full scope of work.
5. The availability of adequate equipment to carry out the work.
6. The examination and report on any cost and schedule impact created by the issue of tender /

contract addenda.

7. Information to support price negotiations.
8. Assistance to the Departmental Representative should PWGSC decide to re-tender the project.

RS 11 CONSTRUCTION SUPPORT AND QUALITY ASSURANCE

The work below will frequently be in support of, and in collaboration with a Prime Consultant contracted separately with the Departmental Representative.

RS 11.1 INTENT

To monitor the implementation of the project in compliance with the Contract Documents and to direct and monitor all necessary or requested changes to the scope of work during construction.

RS 11.2 CONSTRUCTION SCHEDULE

The Consultant must:

1. As soon as practical after the award of the Construction Contract, request from the Departmental Representative a Contractor's detailed construction schedule, and, after a review for conformity with the Project Schedule, forward two (2) copies of the construction schedule to the Departmental Representative.
2. Monitor and report to the Departmental Representative the progress of the construction and
3. Notify the Departmental Representative of any known and anticipated delays which may affect the completion date of the Project, and keep accurate records of the causes of delays.

Only the Departmental Representative may approve any request for Time Extensions. The Departmental Representative must evaluate all requests from the Contractor for time extensions, and must issue directions to the Contractor and the Consultant.

RS 11.3 CONSTRUCTION MEETINGS

The Consultant must:

1. At the request of the Departmental Representative attend construction meetings as required.
2. Maintain a record of the proceedings of such meetings.
3. Attend special meetings when unforeseen problems are encountered during the different phases of construction, such as the foundation construction or excavation.
4. Review alternative or remedial proposals involving geotechnical considerations.
5. Assist in resolving problems with unexpected soil/rock conditions on site.

RS 11.4 CLARIFICATION AND INTERPRETATION

The Consultant must provide clarification and interpretation of the construction documents in written or graphic form, to the Contractor for the proper execution and progress of the construction as and when necessary.

RS 11.5 SHOP DRAWINGS

The Consultant must:

1. On behalf of the Departmental Representative, request and obtain from the Contractor all shop drawings as specified in the construction documents.
2. Review in a timely manner the shop drawings provided by the Contractor to determine conformity with the general concept and intent of the construction documents and indicate to the Contractor such conformance with the general concept or lack thereof.
3. Provide the Departmental Representative with one (1) copy when such conformity is confirmed.
4. On completion of the project, forward three (3) copies of reviewed and approved shop drawings to the Departmental Representative. Ensure that shop drawings include the project number and are recorded in sequence.

RS 11.6 TESTING AND INSPECTIONS

The Consultant must:

1. Recommend the need for, and review, test reports of materials or construction.
2. Recommend quality assurance testing to be undertaken during construction, evaluate the results and advise the Departmental Representative accordingly.
3. Advise the Departmental Representative when portions of the work must be inspected prior to being covered up. Conduct these inspections in a timely manner at the request of the Departmental Representative.
4. Advise the Departmental Representative when observed material or construction fails to comply with the requirements of the Construction Contract.
5. Assist the Departmental Representative in evaluating invoices from testing firms for services performed.
6. Typical required services will include (as applicable to the requirements of each Call-up):

Quality assurance testing and inspections:

- Foundation Subgrade.
- Pavement formulas.
- Concrete formulas.
- Pile Driving.
- Load Test Supervision Fill.
- Compaction Testing.
- Pavement Subgrade Testing.
- Field and laboratory testing of soils and rocks.
- Concrete Testing.

Monitoring:

- Water levels.
- Slope Stability Monitoring.
- Pile dynamic analysis
- Field Instrumentation-Settlement.
- Blast monitoring during excavation and/or seismic risk analysis.
- Evaluation of instrumentation data.
- Survey of existing buildings and structures (including 3D model of existing) prior to and during construction.
- Monitoring - during construction and long-term (e.g. vibration during excavation).

Design changes:

- Geotechnical engineering work resulting from changes to the project, such as changes in scope, complexity, diversity or magnitude of the project.
- Review of design drawings or Specifications prepared by others to determine suitability.
- Review of alternative designs or products after completion of the Contract Documents.

Review of the contractor's methods:

- Review of the contractor's methods, procedures and construction equipment with respect to the effect on the project.
- Review of construction methodology and reporting to the owner.
- Evaluation of the contractor's proposed method of foundations, review of shop drawings, shoring, etc.
- Review of alternative designs or products after completion of the Contract Documents.
- Work resulting from corrections or revisions required because of errors or omissions in construction by the contractor.
- Special Specifications - the geotechnical engineer may provide special clauses to be included in the specifications where unusual soil, rock or groundwater conditions exist.
- Design review or field observations of shoring or bracing for excavations and building or underpinning of adjacent structures.

RS 11.7 SITE VISITS

The Consultant must:

1. Make all necessary visits to the site to determine, on an adequate sampling basis, whether this work is in conformity with the construction documents.
2. Record and report to the Departmental Representative on the progress, non-conformity and deficiencies observed during each site visit, and provide the Departmental Representative lists of these deficiencies.
3. Recommend the action to be taken.

RS 11.8 CHANGES TO CONSTRUCTION CONTRACT

The Consultant must:

1. Submit all requests and recommendations for changes to the Construction Contract and their implications to the Departmental Representative for approval.
2. Obtain from the Departmental Representative the Contractor's quotations for contemplated changes, review the prices for acceptability, assess the effect on construction progress, and submit recommendations to the Departmental Representative.
3. Prepare Contemplated Change Notices (CCN) and Change Order (CO) and submit to the Departmental Representative for approval and processing.

Only the Departmental Representative has the authority to change the scope or price of the Construction Contract. The Departmental Representative must issue to Change Orders for all approved changes.

RS 11.9 CONTRACTOR'S PROGRESS CLAIM

The Consultant must on behalf of the Departmental Representative:

1. Request from the Contractor a cost breakdown of the Construction Contract Award Price in detail appropriate to the size and complexity of the Project, or as may otherwise be specified in the Construction Contract, and submit the cost breakdown to the Departmental Representative prior to the Contractor's first progress claim.

2. Examine progress claims in a timely manner and, if acceptable, certify the progress claims for work completed and materials delivered pursuant to the Construction Contract, and submit them to the Departmental Representative for approval and processing.
3. If the construction is based on unit prices, measure and record the quantities of labour, materials and equipment involved for the purpose of certifying progress claims.
4. Submit a construction schedule progress report with each progress claim.

RS 11.10 INTERIM COMPLETION OF THE PROJECT

The Consultant must:

1. Review the construction with the Departmental Representative and the Contractor, and record all unacceptable and incomplete work detected.
2. Request from the Contractor, review for completeness and adequacy and provide the Departmental Representative with, all operations and maintenance manuals and any other documents or items to be provided by the Contractor, in accordance with the Construction Contract.
3. Prepare and submit to the Departmental Representative for approval and processing, and as a basis for payment to the Contractor, an Interim Certificate of Completion as required by the Construction Contract, together with supporting documents properly signed and certified.

RS 11.11 AS-BUILT AND RECORD DRAWINGS

The Consultant must, before issuance of the Final Certificate of Completion:

1. On behalf of the Departmental Representative obtain any marked-up construction drawings and as-built drawings from the Contractor.
2. Prepare and provide the Departmental Representative with a complete set of record drawings of the type and number as specified.
3. Verify that record drawings are suitable for microfilming, incorporating all recorded changes to the original working drawings based on as-built prints, drawings and other information provided by the Contractor, together with change orders and site instructions.
4. Verify that record drawings are labelled "Record", dated and signed by the Consultant, and also provide a marked-up copy of the specifications recording changes related thereto.

RS 11.12 FINAL COMPLETION OF THE PROJECT

The Consultant must:

1. Advise the Departmental Representative when the construction has been completed in general conformity with the Construction Contract.
2. Make a final review of the construction with the Departmental Representative and the Contractor and, if satisfactory, prepare and submit to the Departmental Representative for approval and final payment to the Contractor, a Final Certificate of Completion as required by the Construction Contract, together with supporting documents properly signed and certified, including manufacturers' and suppliers' warranties.

RS 11.13 RESIDENT SITE SERVICES DURING CONSTRUCTION

Depending on the type of project, the Departmental Representative may specify, in the Terms of Reference for engineering services, the need for Resident Site Services during construction. Where such

services are required, the Consultant must appoint a qualified Resident Construction Services Representative for the duration of the construction stage of the project.

Without being limited to the following, the Resident Construction Services Representative must:

1. Represent the full time or part-time presence of the Consultant on the construction site.
2. Inspect and monitor all phases of the construction work, and report any discrepancies to the Departmental Representative for appropriate action.
3. Neither authorize nor request any change in the work which would constitute a change in design or in the value of the contract. Any requests for such changes must be submitted to the Departmental Representative for approval.
4. Verify quantities of materials received on site and records work progress, including photographs as required.
5. Maintain a daily log of inspections and issue a weekly written report to the Consultant for distribution as directed by the Departmental Representative.
6. Prepare other reports or surveys as may be requested by the Departmental Representative through the Consultant.
7. Supervise installation of instruments which monitor behaviour of the structure during construction and after its completion.

RS 11.14 POST-CONSTRUCTION WARRANTY REVIEW

The Consultant must:

1. Review if requested, during the Contractor's warranty period, any defects reported by the Departmental Representative.
2. 30 days prior to the expiry of any warranty period, visit the site, and record any defects observed or reported.
3. At the end of any warranty period, carry out a final review of the Project and report to the Departmental Representative the status of defects. If the Departmental Representative accepts the rectification of the defects, a notice of "Final Warranty Inspection" must be issued to the Contractor.

RS 12 PEER REVIEW AND PROFESSIONAL SUPPORT

The Consultant may be called upon to provide support to PWGSC in relation to peer review of reports prepared by others, or professional support in claims or litigation. This work typically requires expert analysis and reporting. The successful consultant will be expected to be able to provide highly specialized services on a case-by-case basis, where in-house expertise is not available they would be expected to procure the required resources from external sources.

RS 13 BILINGUAL CONSULTANT REPORTS

Any documents prepared by the Consultant, will be prepared in both official languages whenever it is identified that the document will become a tender document in a public bid or otherwise released to the public. A professional seal will be affixed to both language versions of the documents.

Annexe 1A

1.01 REFERENCE STANDARDS

- .1 Canada Labour Code, Part 2, Canada Occupational Safety and Health Regulations
- .2 Province of Ontario
 - .1 Occupational Health and Safety Act and Regulations for Construction Projects, R.S.O. [1990, c.0.1, as amended and O. Reg. 213/91 as amended] - Updated [2018].
- .3 Province of Quebec
 - .1 An Act Respecting Occupational Health and Safety, R.S.Q., c.S-2.1 (current edition) - Updated [2018].

1.02 HEALTH AND SAFETY ACTION AND INFORMATIONAL SUBMITTALS

- .1 Submit site-specific Health and Safety Plan prior to commencement of Work. Health and Safety Plan must include:
 - .1 Results of site specific safety hazard assessment.
 - .2 Results of safety and health risk or hazard analysis for site tasks and operation.
- .2 Submit a copy of Consultant's authorized representative's work site health and safety inspection reports to Departmental Representative weekly.
- .3 Submit copies of reports or directions issued by Federal, Provincial and Territorial health and safety inspectors if applicable.
- .4 Submit copies of incident and accident reports.
- .5 Submit WHMIS Safety Data Sheets (SDS).
- .6 Departmental Representative will review Consultant's site-specific Health and Safety Plan and provide comments to Consultant.
- .7 Departmental Representative's review of Consultant's final Health and Safety plan should not be construed as approval and does not reduce the Consultant's overall responsibility for construction Health and Safety.
- .8 Medical Surveillance: where prescribed by legislation, regulation or safety program, submit certification of medical surveillance for site personnel prior to commencement of Work, and submit additional certifications for any new site personnel to Departmental Representative
- .9 On-site Contingency and Emergency Response Plan: address standard operating procedures to be implemented during emergency situations.

1.03 FILING OF NOTICE

- .1 File Notice of Project with Provincial authorities prior to beginning of Work, if required.
- .2 Consultant shall be responsible and assume the Principal Contractor role for each work zone location and not the entire property. Consultant shall provide a written acknowledgement of this responsibility with 3 weeks of contract award. Consultant to submit written acknowledgement to CSST along with Ouverture de Chantier Notice if required.
- .3 Consultant shall agree to install proper site separation and identification in order to maintain time and space at all times throughout life of project.

1.04 SAFETY ASSESSMENT

- .1 Perform site specific safety hazard assessment related to project.

1.05 MEETINGS

- .1 Schedule and administer Health and Safety meeting with Departmental Representative prior to commencement of Work.

1.06 GENERAL REQUIREMENTS

- .1 Develop written site-specific Health and Safety Plan based on hazard assessment prior to beginning site Work and continue to implement, maintain, and enforce plan until final demobilization from site.
- .2 Departmental Representative may respond in writing, where deficiencies or concerns are noted and may request re-submission with correction of deficiencies or concerns.

1.07 RESPONSIBILITY

- .1 Be responsible for health and safety of persons on site, safety of property on site and for protection of persons adjacent to site and environment to extent that they may be affected by conduct of Work.
- .2 Consultant will be responsible and assume the role Constructor as described in the Ontario Occupational Health and Safety Act and Regulations for Construction Projects.
- .3 Consultant shall be the Principal Contractor as described in the Quebec Act Respecting Health and Safety code for the Construction for only their scope and areas of work.
- .4 Comply with and enforce compliance by employees with safety requirements of Contract Documents, applicable federal, provincial, territorial and local statutes, regulations, and ordinances, and with site-specific Health and Safety Plan.

1.08 COMPLIANCE REQUIREMENTS

- .1 Comply with Ontario Occupational Health and Safety Act, R.S.O. 1990, c. 0.1 and Ontario Regulations for Construction Projects, O. Reg. 213/91.
- .2 Comply with R.S.Q., c. S-2.1, an Act respecting Health and Safety, and c. S-2.1, r.4 Safety Code for the Construction Industry.
- .3 Comply with Occupational Health and Safety Regulations, 1996.
- .4 Comply with Canada Labour Code, Canada Occupational Safety and Health Regulations.

1.09 UNFORSEEN HAZARDS

- .1 When unforeseen or peculiar safety-related factor, hazard, or condition occur during performance of Work, follow procedures in place for Employee's Right to Refuse Work in accordance with Acts and Regulations of Province having jurisdiction and advise Departmental Representative verbally and in writing.
- .2 When unforeseen or peculiar safety-related factor, hazard, or condition occur during performance

of Work, advise Health and Safety co-ordinator and follow procedures in accordance with Acts and Regulations of Province having jurisdiction and advise Departmental Representative verbally and in writing.

1.10 HEALTH AND SAFETY CO-ORDINATOR

- .1 Employ and assign to Work, competent and authorized representative as Health and Safety Co-ordinator. Health and Safety Co-ordinator must:
 - .1 Have site-related working experience specific to activities associated with sub-surface investigations, drilling and excavation works.
 - .2 Have working knowledge of occupational safety and health regulations.
 - .3 Be responsible for completing Consultant's Health and Safety Training Sessions and ensuring that personnel not successfully completing required training are not permitted to enter site to perform Work.
 - .4 Be responsible for implementing, enforcing daily and monitoring site-specific Consultant's Health and Safety Plan.
 - .5 Be on site during execution of Work and report directly to and be under direction of site supervisor.

1.11 POSTING OF DOCUMENTS

- .1 Ensure applicable items, articles, notices and orders are posted in conspicuous location on site in accordance with Acts and Regulations of Province having jurisdiction, and in consultation with Departmental Representative.

1.12 CORRECTION OF NON-COMPLIANCE

- .1 Immediately address health and safety non-compliance issues identified by authority having jurisdiction or by Departmental Representative.
- .2 Provide Departmental Representative with written report of action taken to correct non-compliance of health and safety issues identified.
- .3 Departmental Representative may stop Work if non-compliance of health and safety regulations is not corrected.

1.13 WORK STOPPAGE

- .1 Give precedence to safety and health of public and site personnel and protection of environment over cost and schedule considerations for Work.



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Documentation and Deliverables Manual



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Revisions

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

1 General

1.1 Effective Date

January 12, 2018

1.2 Authority

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

1.3 Purpose

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

1.4 Scope

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

1.5 Harmonization with Terms of Reference

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

1.6 Departmental Name Change

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

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

1.7 Terminology

This document utilizes the following terminology:

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

1.8 Definitions

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

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

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

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

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

2 Construction Documents

2.1 General

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

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

2.1.1 Principles of PWGSC Contract Documents

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

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

2.1.2 Translation

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

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

2.1.3 Construction Documents Definitions

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

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

2.1.4 Quality Assurance

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

2.1.5 Quality Assurance Deliverables

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

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

2.1.6 Terminology & Quantities

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

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

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

2.1.7 Units of Measure

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

2.2 Drawings

2.2.1 General

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

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

2.2.2 Information to be Included

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

2.2.3 Title Blocks and Revision Notes

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

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

2.2.4 Drawing Numbers

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

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

2.2.5 Presentation Requirements

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

2.2.6 Legends

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

2.2.7 Schedules and Tables

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

2.2.8 North Arrow

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

2.2.9 Drawing Symbols

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

2.2.10 As-Built Drawings

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

2.2.11 Submission Format

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

2.2.11.1 Drawing Hard Copy Deliverable Format

Drawing submitted in hard copy shall be:

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

2.2.11.2 Drawing Electronic Copy Deliverable Format

Drawing submitted electronically shall be provided:

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

2.3 Building Information Modelling (BIM)

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

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

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

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

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

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

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

2.4 Specifications

2.4.1 National Master Specification

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

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

2.4.2 Index

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

2.4.3 Specification Organization

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

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

2.4.4 Standards

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

2.4.5 Specifying Materials

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

2.4.5.1 Alternate Products and Materials

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

2.4.5.2 Sole Sourcing

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

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

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

Designated Contractor

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

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

Designated Contractor

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

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

Materials

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

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

Acceptable Materials

- .1 The only acceptable materials are [_____].

2.4.6 Measurement for Payment

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

2.4.6.1 Unit Prices

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

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

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

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

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

2.4.7 Cash Allowances

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

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

2.4.8 Warranties

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

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

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

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

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

2.4.9 Miscellaneous Requirements

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

2.4.10 Specification Coordination

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

2.4.11 Regional Guide

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

2.4.12 Health and Safety

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

2.4.13 Subsurface Investigation Reports

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

Subsurface Investigation Report(s)

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

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

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

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

2.4.14 Prequalification and Pre-Award Submissions

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

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

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

2.4.15 Contracting Issues

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

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

2.4.16 Specification Submission Format

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

2.4.16.1 Specification Hard Copy Deliverable Format

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

2.4.16.2 Specification Electronic Copy Deliverable Format

Specifications submitted electronically shall be:

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

2.5 Addenda

2.5.1 Format

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

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

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

2.5.2 Content

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

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

3 Cost Estimates

3.1 Cost Estimates Submission Formats

3.1.1 Format

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

3.1.2 Contents

All cost estimates shall contain the following:

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

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

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

3.2 Classes of Cost Estimates for Construction Projects

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

3.2.1 Class D (Indicative) Estimate

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

3.2.2 Class C Estimate

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

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

3.2.3 Class B (Substantive) Estimate

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

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

3.2.4 Class A (Pre-Tender) Estimate

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

4 Project Schedules

4.1 Schedule Format

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

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

4.2 Progress Report

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

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

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

4.2.1 Executive Summary

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

4.2.2 Narrative Report

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

4.2.3 Variance Report

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

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

4.2.4 Criticality Report

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

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

4.2.5 Exception Report

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

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

The exception report shall be provided in the following format:

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

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

4.2.6 Master Schedule

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

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

4.2.7 Detailed Project Schedule

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

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

Appendix A Checklist for the Submission of Construction Documents

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

Drawings\Design			
Item	Verified by	Explanations	Action By
1 Index			
1a The index shows a complete listing of drawing titles and numbers.			
2 Title Blocks			
2a The title block is as per the <i>PWGSC National CADD Standard</i> .			
3 Units			
3a All units of measure are metric.			
4 Trade Names			
4a Trade names are not used.			
5 Specification Notes			
5a There are no specification-type notes.			
6 Terminology			
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.			
7 Information to be included			
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.			

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

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

Specifications			
Item	Verified by	Explanations	Action by
7c Non-restrictive, non-trade name “prescription” or “performance” specifications are used throughout.			
7d The term “Acceptable Manufacturers” is not used.			
7e No sole sourcing has been used.			
7f 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.			
8 Measurement for Payment			
8a Unit prices are used only for work that is difficult to estimate.			
9 Cash Allowances			
9a No cash allowances have been used or if they have, approval from the Departmental Representative has been received.			
10 Miscellaneous Requirements			
10a No paragraphs noted as “Scope of Work” are included.			
10b In Part 1 - General of any section, the paragraphs “Summary” and “Section Includes” are not used.			
11 Specification Coordination			
11a The list of related sections and appendices are coordinated.			
12 Health and Safety			
12a Section 01 35 29.06 – Health and Safety Requirements is included.			
13 Subsurface Investigation Reports			
13a Subsurface investigation reports are included after Section 31.			
14 Prequalifications			
14a 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.			

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

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

Consultant's Representative: _____

Firm name: _____

Signature: _____ Date: _____

Appendix B Drawings and Specifications Table of Contents Template

B.1 General

List all drawings by number and title.

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

B.2 Sample Table of Contents

Project No: _____ **Table of Contents** **Index**
Page 1 of ____

DRAWINGS:

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

SPECIFICATIONS:

DIVISION	SECTION	NO. OF PAGES
01	01 00 10 – General InstructionsXX
	01 14 25 – Designated Substances ReportXX
	01 35 30 – Health and SafetyXX
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 1st 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 2nd Tier Subfolder

The 2nd 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 3rd Tier Subfolder

The 3rd 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 4th 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 4th 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 4th 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 4th-Tier Subfolders for Specifications

The “Specifications” and “Devis” folders must have 4th 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 4th 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