



RETURN BIDS TO:

RETOURNER LES SOUMISSIONS À:

**Bid Receiving - PWGSC / Réception des soumissions -
TPSGC**

11 LaurierSt./ 11, rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

SOLICITATION AMENDMENT

MODIFICATION DE L'INVITATION

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

Comments - Commentaires

THIS DOCUMENT CONTAINS SECURITY
REQUIREMENTS.

Vendor/Firm Name and Address

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

Issuing Office - Bureau de distribution

Infrastructure Maintenance and Solution Services
Division (FK)

L'Esplanade Laurier,

East Tower 4th Floor

L'Esplanade Laurier,

Tour est 4e étage

140 O'Connor, Street

Ottawa

Ontario

K1A 0R5

Title - Sujet PMSS SPIB	
Solicitation No. - N° de l'invitation EP747-200162/A	Amendment No. - N° modif. 004
Client Reference No. - N° de référence du client 20200162	Date 2019-06-18
GETS Reference No. - N° de référence de SEAG PW-\$\$FK-290-77223	
File No. - N° de dossier fk290.EP747-200162	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2019-07-15	
Time Zone Fuseau horaire Eastern Daylight Saving Time EDT	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Ghoumrassi, Hakim	Buyer Id - Id de l'acheteur fk290
Telephone No. - N° de téléphone (819) 664-7321 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

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

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PART 1 – GENERAL INFORMATION

1.1 Introduction

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Attachments include the Pricing Schedule, Flexible Grid, Technical Criteria and Additional Certifications Precedent to Contract Award.

The Annexes include the Statement of Work, Basis of Payment, Security Requirements Check List, Insurance Requirements, **Template for reporting on the results of the IBP**, and Task Authorization Form.

1.2 Summary

1.2.1 PSPC requires Real Property Project Management support services to be provided by a highly experienced project leadership, management and administration service provider. The Contractor must assist PSPC to manage the planning, design and implementation for the Science and Parliamentary Infrastructure Branch Senate Accommodation Program.

1.2.2 This bid solicitation is being issued to satisfy the requirements of PSPC. It is intended to result in the award of one (1) contract for two (2) years, plus three (3) x two (2)–year irrevocable options allowing Canada to extend the term of the contract.

1.2.3 The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO–AGP), the North American Free Trade Agreement (NAFTA), the Canada–European Union Comprehensive Economic and Trade Agreement (CETA), Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and the Canadian Free Trade Agreement (CFTA).

1.2.4 There is a security requirement associated with this requirement. For additional information, consult Part 6 – Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the Canadian Industrial Security Directorate (CISD), Industrial and Security Program of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

1.2.5 The resulting Contract is not to be used for deliveries within a Comprehensive Land Claims Settlement Area (CLCSA). All requirements for delivery within a CLCSA are to be processed individually.

1.2.6 The Federal Contractors Program (FCP) for employment equity applies to this procurement; refer to Part 5 – Certifications and Additional Information, Part 7 – Resulting Contract Clauses and the annex titled Federal Contractors Program for Employment Equity – Certification.

1.2.7 This bid solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation to transmit their bid electronically. Bidders must refer to Part 2 entitled Bidder Instructions, and Part 3 entitled Bid Preparation Instructions, of the bid solicitation, for further information.

1.2.8 The Phased Bid Compliance Process applies to this requirement.

1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

PART 2 – BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The 2003 (2019–03–04) Standard Instructions – Goods or Services – Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of 2003, Standard Instructions – Goods or Services – Competitive Requirements, is amended as follows:

Delete: 60 days
Insert: 180 days

2.2 Submission of Bids

Bids must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated in the bid solicitation.

Note: For bidders choosing to submit using epost Connect for bids closing at the Bid Receiving Unit in the National Capital Region (NCR) the email address is:

tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca

Note: Bids will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in Standard Instructions 2003, or to send bids through an epost Connect message if the bidder is using its own licensing agreement for epost Connect.

Due to the nature of the bid solicitation, bids transmitted by facsimile to PWGSC will not be accepted.

2.4 Former Public Servant

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, bidders must provide in writing before contract award for each question below, the answer and, as applicable, the information required.

If the Contracting Authority has not received the answer to the question and, as applicable, the information required by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the answer and, as applicable, the information required. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid 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 Bidder a FPS in receipt of a pension?

Yes () No ()

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

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

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

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive?

Yes () No ()

If so, the Bidder 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; and
- g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

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

2.5 Inquiries – Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than 5 calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

2.6 Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the bidders.

2.7 Improvement of Requirement During Solicitation Period

Should Bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, Bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least seven (7) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

PART 3 – BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

- If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 standard instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.

The bid must be gathered per section and separated as follows:

Section I:	Technical Bid
Section II:	Indigenous Benefits Plan
Section III:	Financial Bid
Section IV:	Certifications
Section V:	Additional Information

- If the Bidder chooses to submit its bid in hard copies, Canada requests that the Bidder submits its bid in separately bound sections as follows:

Section I:	Technical Bid (5 hard copies)
Section II:	Indigenous Benefits Plan (5 hard copies)
Section III:	Financial Bid (1 hard copy)
Section IV:	Certifications (1 hard copy)
Section V:	Additional Information (1 hard copy)

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

- If the Bidder is simultaneously providing a hard copy of the bid using another acceptable delivery method, and if there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the soft copy will have priority over the wording of the hard copy.

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

Canada requests that bidders follow the format instructions described below in the preparation of their bid:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper; and
- (b) use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](#).

To assist Canada in reaching its objectives, bidders should:

1. use paper containing fiber certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
2. use an environmentally-preferable format including black and white printing instead of color printing, printing double sided/duplex, using staples or clips instead of cerlox, duo tangs or binders.

3.2 Section I: Technical Bid

In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

3.3 Section II: Indigenous Benefits Plan

As part of Canada's commitment to support its Indigenous First Nations population, this procurement contains a point rated Indigenous Benefits Plan (IBP) that aims to provide socio-economic benefits to Indigenous Peoples and Indigenous Firms in Canada. As a result, bidders must submit a draft IBP as part of their RFP response. Instructions on how to prepare an IBP can be found in Part 4 – Attachment 3.

3.4 Section III: Financial Bid

3.4.1 Bidders must submit their financial bid in Canadian funds and in accordance with the pricing schedule detailed in Attachment 1 to Part 3.

3.4.2 Bidders must submit their rates with Canadian customs duties and excise taxes included, as applicable; and Applicable Taxes excluded.

3.4.3 When preparing their financial bid, Bidders should review clause 4.1.3, Financial Evaluation, of Part 4 of the bid solicitation; and article 7.6, Payment, of Part 7 of the bid solicitation.

3.4.4 Electronic Payment of Invoices – Bid

Canada requests that bidders:

- select option 1 or, as applicable, option 2 below; and
- include the selected option in Section II of their bid.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

Option 1:

The Bidder accepts to be paid by the following Electronic Payment Instrument(s):

- ☐ VISA Acquisition Card
- ☐ MasterCard Acquisition Card
- ☐ Direct Deposit (Domestic and International)
- ☐ Electronic Data Interchange (EDI)
- ☐ Wire Transfer (International Only)
- ☐ Large Value Transfer System (LVTS) (Over \$25M)

Option 2:

- ☐ The Bidder does not accept to be paid by Electronic Payment Instruments.

3.4.5 SACC Manual Clauses

C3011T (2013–11–06), Exchange Rate Fluctuation

3.5 Section IV: Certifications

In Section III of their bid, bidders should provide the certifications required under Part 5 and, as applicable, any associated additional information.

3.6 Section V: Additional Information

In Section IV of their bid, Bidders should provide:

1. their legal name;
2. their Procurement Business Number (PBN);
3. the name of the contact person (provide also this person's mailing address, phone and facsimile numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid, and any contract that may result from their bid;
4. for Part 2, article 3, Former Public Servant, of the bid solicitation: the required answer to each question; and, if the answer is yes, the required information;
5. for Part 6, article 1, Security Requirement, of the bid solicitation:
 - a) Information security;
 - b) for each proposed location of work performance or document safeguarding, the address containing the information below.

Address:

Street Number / Street Name, Unit / Suite / Apartment Number

City, Province, Territory / State

Postal Code / Zip Code

Country

6. Bidders 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

ATTACHMENT 1 TO PART 3 PRICING SCHEDULE

The Bidder should complete this pricing schedule and include it in its financial bid once completed. As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid its quoted all-inclusive fixed hourly rate (in Can \$) for each of the resource categories and levels identified.

The volumetric data included in this pricing schedule are provided for bid evaluated price determination purposes only. They are not to be considered as a contractual guarantee. Their inclusion in this pricing schedule does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

The rates included in this pricing schedule exclude the total estimated cost of the authorized travel and living expenses.

The rates included in this pricing schedule include the total estimated cost of any travel and living expenses that may need to be incurred for the Work described in Part 7 of the bid solicitation required to be done, delivered or performed inside the National Capital Region (NCR) defined in the National Capital Act (R.S.C., 1985, c. N-4), available on the Justice Website (<https://laws-lois.justice.gc.ca/eng/acts/N-4/page-4.html#docCont>).

Under any resulting contract, Canada will not accept travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy its contractual obligations.

TABLE 1 - PRICING SCHEDULE							
Consultant Category	Level of Expertise	Estimated Level of Effort (days)				(E) FIRM HOURLY RATE	(F) TOTAL ESTIMATE COST = (A+B+C+D x 7.5 hrs : (E)
		(A) Initial Contract Period Years 1 & 2	(B) Option Period 1 Years 3 & 4	(C) Option Period 2 Years 5 & 6	(D) Option Period 3 Years 7 & 8		
Quality Assurance / Management Specialist	Senior	87	110	110	110	\$	\$
Risk Management Specialist	Senior	87	110	110	110	\$	\$

Technical Writer	Intermediate	87	110	110	110	\$	\$
Project Administrator for Real Property	Intermediate	696	660	440	440	\$	\$
Project Manager for Real Property	Senior	696	880	880	880	\$	\$
Project Manager for Real Property	Intermediate	348	0	0	0	\$	\$
Project Manager for Real Property (Construction)	Senior	348	220	0	0		
Project Leader for Real Property	Senior	348	440	440	440	\$	\$
Project Planner for Real Property	Intermediate	40	50	50	50	\$	\$
Financial / Cost Specialist for Real Property	Intermediate	348	440	440	440	\$	\$
Claims Analyst	Senior	87	110	110	110	\$	\$
TOTAL BID PRICE FOR EVALUATION (BIDDER'S EVALUATED PRICE) = (F)							\$

TOTAL BID PRICE FOR EVALUATION (BIDDER'S EVALUATED PRICE) = \$------(F)

Definition of a Day/Proration

A day is defined as 7.5 hours exclusive of meal breaks. Payment shall be for days actually worked with no provision for annual leave, statutory holidays and sick leave. Time worked which is more or less than a day shall be prorated to reflect actual time worked. All-inclusive hourly rates are applicable to both a day, as defined, and any other shift work exceeding 7.5 hours per day as required, seven (7) days per week.

Costs shall not appear in any other area of the proposal except in the financial proposal section.

ESCALATION CLAUSE

The firm hourly rates detailed in Table 1 – Pricing Schedule will be adjusted annually on the start date of each new Contract Year (starting with Contract Year 2 and for the whole period of the contract including the option periods) by the amount established based on the annual average percentage increase (decrease) in the monthly index of the Consumer Price Index for Canada, All-Items (Not Seasonally Adjusted), published in Statistics Canada Catalogue no.62-001-X, Table 5, for the 12-month period ending 2 months prior to the new Contract Year Start date.

Example:

Contract Start Date: March 1, 2016

At the start of Contract Year 2 (i.e. March 1, 2017), the Contract Year 1 rates as stated in the Additional Bidders Services Table would be increased by 1.3% based on the following assumptions:

	% Change in Monthly CPI
February 2016	1.1%
March 2016	1.2%
April 2016	0.9%
May 2016	0.9%
June 2016	1.1%
July 2016	1.0%
August 2016	1.4%
September 2016	1.6%
October 2016	1.6%
November 2016	1.7%
December 2016	1.5%
January 2017	1.7%
	$15.7\% / 12 = 1.3\%$

To determine the Contract Year 3 rates, the Contract Year 2 rates calculated above would be adjusted using the same Statistics Canada Table and same formula with data for the February 2017 - January 2018 12-month period.

PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- a. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- b. An evaluation team composed of representatives of Canada will evaluate the bids.
- c. Canada will use the Phased Bid Compliance Process (PBCP) described below.

4.1.1 Phased Bid Compliance Process

4.1.1.1 (2018-07-19) General

- (a) Canada is conducting the PBCP described below for this requirement.
- (b) Notwithstanding any review by Canada at Phase I or II of the PBCP, Bidders are and will remain solely responsible for the accuracy, consistency and completeness of their Bids and Canada does not undertake, by reason of this review, any obligations or responsibility for identifying any or all errors or omissions in Bids or in responses by a Bidder to any communication from Canada.

THE BIDDER ACKNOWLEDGES THAT THE REVIEWS IN PHASE I AND II OF THIS PBCP ARE PRELIMINARY AND DO NOT PRECLUDE A FINDING IN PHASE III THAT THE BID IS NON-RESPONSIVE, EVEN FOR MANDATORY

REQUIREMENTS WHICH WERE SUBJECT TO REVIEW IN PHASE I OR II AND NOTWITHSTANDING THAT THE BID HAD BEEN FOUND RESPONSIVE IN SUCH EARLIER PHASE. CANADA MAY DEEM A BID TO BE NON-RESPONSIVE TO A MANDATORY REQUIREMENT AT ANY PHASE.

THE BIDDER ALSO ACKNOWLEDGES THAT ITS RESPONSE TO A NOTICE OR A COMPLIANCE ASSESSMENT REPORT (CAR) (EACH DEFINED BELOW) IN PHASE I OR II MAY NOT BE SUCCESSFUL IN RENDERING ITS BID RESPONSIVE TO THE MANDATORY REQUIREMENTS THAT ARE THE SUBJECT OF THE NOTICE OR CAR, AND MAY RENDER ITS BID NON-RESPONSIVE TO OTHER MANDATORY REQUIREMENTS.

- (c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. This shall not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.
- (d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions

(SACC) 2003 (2018-05-22) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).

- (e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

4.1.1.2 (2018-03-13) Phase I: Financial Bid

- (a) After the closing date and time of this bid solicitation, Canada will examine the Bid to determine whether it includes a Financial Bid and whether any Financial Bid includes all information required by the solicitation. Canada's review in Phase I will be limited to identifying whether any information that is required under the bid solicitation to be included in the Financial Bid is missing from the Financial Bid. This review will not assess whether the Financial Bid meets any standard or is responsive to all solicitation requirements.
- (b) Canada's review in Phase I will be performed by officials of the Department of Public Works and Government Services.
- (c) If Canada determines, in its absolute discretion that there is no Financial Bid or that the Financial Bid is missing all of the information required by the bid solicitation to be included in the Financial Bid, then the Bid will be considered non-responsive and will be given no further consideration.
- (d) For Bids other than those described in c), Canada will send a written notice to the Bidder ("Notice") identifying where the Financial Bid is missing information. A Bidder, whose Financial Bid has been found responsive to the requirements that are reviewed at Phase I, will not receive a Notice. Such Bidders shall not be entitled to submit any additional information in respect of their Financial Bid.
- (e) The Bidders who have been sent a Notice shall have the time period specified in the Notice (the "Remedy Period") to remedy the matters identified in the Notice by providing to Canada, in writing, additional information or clarification in response to the Notice. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the Notice.

- (f) In its response to the Notice, the Bidder will be entitled to remedy only that part of its Financial Bid which is identified in the Notice. For instance, where the Notice states that a required line item has been left blank, only the missing information may be added to the Financial Bid, except that, in those instances where the addition of such information will necessarily result in a change to other calculations previously submitted in its Financial Bid, (for example, the calculation to determine a total price), such necessary adjustments shall be identified by the Bidder and only these adjustments shall be made. All submitted information must comply with the requirements of this solicitation.
- (g) Any other changes to the Financial Bid submitted by the Bidder will be considered to be new information and will be disregarded. There will be no change permitted to any other Section of the Bidder's Bid. Information submitted in accordance with the requirements of this solicitation in response to the Notice will replace, in full, **only** that part of the original Financial Bid as is permitted above, and will be used for the remainder of the bid evaluation process.
- (h) Canada will determine whether the Financial Bid is responsive to the requirements reviewed at Phase I, considering such additional information or clarification as may have been provided by the Bidder in accordance with this Section. If the Financial Bid is not found responsive for the requirements reviewed at Phase I to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- (i) Only Bids found responsive to the requirements reviewed in Phase I to the satisfaction of Canada, will receive a Phase II review.

4.1.1.3 (2018-03-13) Phase II: Technical Bid

- (a) Canada's review at Phase II will be limited to a review of the Technical Bid to identify any instances where the Bidder has failed to meet any Eligible Mandatory Criterion. This review will not assess whether the Technical Bid meets any standard or is responsive to all solicitation requirements. Eligible Mandatory Criteria are all mandatory technical criteria that are identified in this solicitation as being subject to the PBCP. Mandatory technical criteria that are not identified in the solicitation as being subject to the PBCP, will not be evaluated until Phase III.
- (b) Canada will send a written notice to the Bidder (Compliance Assessment Report or "CAR") identifying any Eligible Mandatory Criteria that the Bid has failed to meet. A Bidder whose Bid has been found responsive to the requirements that are reviewed at Phase II will receive a CAR that states that its Bid has been found responsive to the requirements reviewed at Phase II. Such Bidder shall not be entitled to submit any response to the CAR.
- (c) A Bidder shall have the period specified in the CAR (the "Remedy Period") to remedy the failure to meet any Eligible Mandatory Criterion identified in the CAR by providing to Canada in writing additional or different information or clarification in response to the CAR. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the CAR.
- (d) The Bidder's response must address only the Eligible Mandatory Criteria listed in the CAR as not having been achieved, and must include only such information as is necessary to achieve such compliance. Any additional

information provided by the Bidder which is not necessary to achieve such

compliance will not be considered by Canada, except that, in those instances where such a response to the Eligible Mandatory Criteria specified in the CAR will necessarily result in a consequential change to other parts of the Bid, the Bidder shall identify such additional changes, provided that its response must not include any change to the Financial Bid.

- (e) The Bidder's response to the CAR should identify in each case the Eligible Mandatory Criterion in the CAR to which it is responding, including identifying in the corresponding section of the original Bid, the wording of the proposed change to that section, and the wording and location in the Bid of any other consequential changes that necessarily result from such change. In respect of any such consequential change, the Bidder must include a rationale explaining why such consequential change is a necessary result of the change proposed to meet the Eligible Mandatory Criterion. It is not up to Canada to revise the Bidder's Bid, and failure of the Bidder to do so in accordance with this subparagraph is at the Bidder's own risk. All submitted information must comply with the requirements of this solicitation.
- (f) Any changes to the Bid submitted by the Bidder other than as permitted in this solicitation, will be considered to be new information and will be disregarded. Information submitted in accordance with the requirements of this solicitation in response to the CAR will replace, in full, **only** that part of the original Bid as is permitted in this Section.
- (g) Additional or different information submitted during Phase II permitted by this section will be considered as included in the Bid, but will be considered by Canada in the evaluation of the Bid at Phase II only for the purpose of determining whether the Bid meets the Eligible Mandatory Criteria. It will not be used at any Phase of the evaluation to increase or decrease any score that the original Bid would achieve without the benefit of such additional or different information. For instance, an Eligible Mandatory Criterion that requires a mandatory minimum number of points to achieve compliance will be assessed at Phase II to determine whether such mandatory minimum score would be achieved with such additional or different information submitted by the Bidder in response to the CAR. If so, the Bid will be considered responsive in respect of such Eligible Mandatory Criterion, and the additional or different information submitted by the Bidder shall bind the Bidder as part of its Bid, but the Bidder's original score, which was less than the mandatory minimum for such Eligible Mandatory Criterion, will not change, and it will be that original score that is used to calculate any score for the Bid
- (h) Canada will determine whether the Bid is responsive for the requirements reviewed at Phase II, considering such additional or different information or clarification as may have been provided by the Bidder in accordance with this Section. If the Bid is not found responsive for the requirements reviewed at Phase II to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- (i) Only Bids found responsive to the requirements reviewed in Phase II to the satisfaction of Canada, will receive a Phase III evaluation.

4.1.1.4 (2018-03-13) Phase III: Final Evaluation of the Bid

- (a) In Phase III, Canada will complete the evaluation of all Bids found responsive to the requirements reviewed at Phase II. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) A Bid is non-responsive and will receive no further consideration if it does not meet all mandatory evaluation criteria of the solicitation.

4.2 Technical Evaluation

4.2.1 Joint Venture Experience

- a) Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.

Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.

- b) A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.

- c) Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either of the following that show in total 100 billable days:

- Contracts all signed by A;
 - Contracts all signed by B; or
 - Contracts all signed by A and B in joint venture, or
 - Contracts signed by A and contracts signed by A and B in joint venture, or
 - Contracts signed by B and contracts signed by A and B in joint venture.
- d) Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the bid solicitation period.

4.2.2 Mandatory Technical Criteria

The Phased Bid Compliance Process will apply to all mandatory technical criteria.

Refer to Attachment 2 to Part 4.

4.2.3 Point Rated Technical Criteria

Refer to Attachment 2 to Part 4. Point-rated technical criteria not addressed will be given a score of zero. **The Phased Bid Compliance Process will apply to the required minimum number of points for the Point Rated Technical Criteria – Written (RTW).**

4.2.4 Indigenous Participation Plan

Refer to Attachment 3 to Part 4, **INDIGENOUS BENEFITS PLAN (IBP)**

4.2.5 Reference Checks:

Reference checks for the purpose of this evaluation are used to verify and validate the bidder's response. In the event of contradiction between the information provided by the reference and the one provided by the bidder, the information provided by the reference will be retained for evaluation purposes. If the information provided by the Bidder cannot be verified or validated, the information will not be evaluated and the bid will receive a score of zero OR not met the criteria in question. Crown references will be accepted.

4.3 Financial Evaluation

For bid evaluation and contractor(s) selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3.

4.4 Basis of Selection

The basis of selection is the highest combined rating of Technical Merit (65%), Price (30%) and Indigenous Benefits Plan (IBP) (5%).

4.4.1 To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation;
- (b) meet all the mandatory technical evaluation criteria; and
- (c) obtain the required minimum number of points for the Point Rated Technical Criteria – Written (RTW), as specified in Attachment 2 to Part 4 Technical Criteria.

4.4.2 Bids not meeting (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid obtaining the highest number of points nor the one with the lowest evaluated price will necessarily be accepted.

4.4.3 The lowest evaluated price (LP) of all responsive bids will be identified and a pricing score (PS), determined as follows, will be allocated to each responsive bid (i): $PS_i = LP / P_i \times 30$. P_i is the evaluated price (P) of each responsive bid (i).

4.4.4 **A technical merit score (TMS), determined as follows, will be allocated to each responsive bid (i): $TMS_i = OS_i \times 65$. OS_i is the overall score (OS) obtained by each responsive bid (i) for all the point rated technical criteria specified in Attachment 1 to Part 4, determined as follows: total number of points obtained / maximum number of points available.**

- 4.4.5 The combined rating (CR) of technical merit and price of each responsive bid (i) will be determined as follows: $CR_i = PS_i + TMS_i$.
- 4.4.6 In addition, the IBP is worth 5% and will then be added to the combined rating (CR).
- 4.4.7 The overall Technical and Financial Score (OTFS) is determined as follows: $OTFS = PS_i + TMS_i + IBP$.
- 4.4.8 The responsive bid with the highest combined rating of technical merit, price and Indigenous Benefits Plan (IBP) will be recommended for award of a contract. In the event two or more responsive bids have the same highest combined rating of technical merit, Price and IBP, the responsive bid that obtained the highest overall score for the combination of the IBP and the point rated technical criteria detailed in Attachment 2 to Part 4 will be recommended for award of a contract.
- 4.4.9 The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 65/30/5 ratio of the technical merit, price, and the IBP respectively.

Basis of Selection – Highest Combined Rating of Technical Merit (65%), Price (30%) and Indigenous Benefits Plan (IBP) (5%)			
Bidder	Bidder 1	Bidder 2	Bidder 3
Overall Score for All the Point Rated Technical Criteria	OS1: 533/615	OS2: 436/615	OS3: 364/615
Bid Evaluated Price	P1: C\$60,000	P2: C\$55,000	LP and P3: C\$50,000
Indigenous Benefits Plan (IBP) 0 or 5	5	0	5
Calculations	Technical Merit Score ($OS_i \times 65 = TMS_i$)	Pricing Score ($LP/P_i \times 30 = PS_i$)	Overall Technical and Financial Score (OTFS) ($TMS_i + PS_i + IBP = OTFS$)
Bidder 1	$533/615 \times 65 = 56.33$	$50/60 \times 30 = 25.00$	$(56.33 + 25 + 5) = 86.33$ *
Bidder 2	$436/615 \times 65 = 46.08$	$50/55 \times 30 = 27.27$	$(46.08 + 27.27 + 0) = 73.35$
Bidder 3	$364/615 \times 65 = 38.47$	$50/50 \times 30 = 30.00$	$(38.47 + 30 + 5) = 73.47$

*Bidder 1 achieved the highest combined rating between technical merit and price. As such, it would be recommended for contract award.

ATTACHMENT 1 TO PART 4 FLEXIBLE GRID

Flexible Grid – Resources

The flexible grid indicates the minimum level of points required to qualify for each Level of Expertise. Various amounts of points are given for relevant education, professional certification and relevant experience. The flexible grid must be used for all categories unless otherwise specified.

Experience

The experience must be demonstrated and be directly related to the resource category.

Bidders should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications/experience were obtained. Experience gained during formal education will not be considered work experience. All requirements for work experience will be obtained in a legitimate work environment as opposed to an educational setting. Co-op work terms are considered work experience provided they are related to the required services. The month(s) of experience listed for a project whose time frame overlaps that of another referenced project, will only be counted once.

The qualifications and experience of the proposed consultant(s) will be assessed against the requirements set out in the Tasks and responsibilities for each respective resource category as outlined in the Statement of Work of this RFP. The Identified User, PSPC, may request reference information. Canada reserves the right to request references from a Bidder to conduct a reference check to verify the accuracy of the information provided. The consultant(s) proposed must meet the minimum experience requirements detailed in this RFP for the category for which they are being proposed.

Education

Academic Certification (Degree, etc) must be obtained through a recognized academic institution in the field of expertise. Points will only be awarded for the highest level of education achieved by the consultant.

A recognized* academic institution refers to Canadian university, college or high school, or the equivalent as established by a recognized* Canadian academic credentials assessment service, if obtained outside Canada.

*The list of recognized organizations can be found under the Canadian Information Centre for International Credentials web site (<https://www.cicic.ca/2/home.canada>).

Relevant Professional Certification

The professional certification must be valid and relevant to the specific consultant category. A maximum of one (1) certification will receive points.

The Certification must be relevant to the field of application. Acceptable certifications include but are not limited to those on the following list. Whether listed or not, it is incumbent upon the Offeror to demonstrate the relevance of professional certification(s) to the proposed work.

- Project Management Professional (PMP)

How to use the Flexible Grid

Points will be allocated to each consultant proposed by the Bidder for the education, the certification and the experience. The total of points will determine if the consultant is considered as a junior, intermediate or senior.

The Identified User, will specify what level of expertise (junior, intermediate or senior) needed for their requirement and the Bidder will have to propose a consultant meeting the minimum of points required to obtain that level. The Bidder can propose a consultant with a higher level of expertise, but the hourly rate of the level of expertise required by the Identified User will apply.

Also, if needed, the Identified User, has the discretion to add mandatory requirements for type and quantity of education, certification or experience and the Bidder must propose a consultant meeting the Identified User's, PSPC's, requirement.

The Identified User, will have the responsibility to assess if the education, certification and experience are related to the consultant category.

The flexible grid to be used is the following:

Flexible Grid – Resources								
	Category	Level	Name	Relevant Education	Professional Certification	Relevant Experience	Total Score	Minimum Points
1	Quality Assurance / Management Specialist	Senior (Optional)						95 pts
2	Risk Management Specialist	Senior (Optional)						95 pts
3	Technical Writer	Intermediate (Optional)						95 pts
4	Project Administrator For Real Property #1	Intermediate						70 pts
5	Project Administrator For Real Property #2	Intermediate						70 pts
6	Project Manager For Real Property #1	Senior						100 pts
7	Project Manager For Real Property #2	Senior (Optional)						100 pts
8	Project Manager For Real Property Construction)	Senior						100 pts
9	Project Manager For Real Property	Intermediate						80 pts
10	Project Leader For Real Property	Senior						100 pts
11	Project Planner For Real Property	Intermediate (Optional)						70 pts
12	Financial/Cost Specialist For Real Property	Intermediate						80 pts

13	Claims Analyst	Senior (Optional)						95 pts
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PLEASE NOTE THAT ANY INDIVIDUAL MAY BE PROPOSED FOR NO MORE THAN ONE RESOURCE CATEGORY

RESOURCE'S CATEGORIES – FLEXIBLE GRID

1. Project Manager for Real Property Flexible Grid

Levels of Expertise

Senior: **Minimum 100 pts**

Intermediate: **Minimum 80 pts**

Junior: **Minimum 65 pts**

Relevant Education to the Consultant Category

University (PhD, Graduate, Undergraduate, degree): 35 pts

College or CEGEP Diploma/Certificate: 25 pts

Professional Certification

- PMI Certification - Project Management Professional (PMP): 15 pts

Relevant Experience in Consultant Category

≥1 yr and <2 yrs: 12-23 months — 10 pts

≥2 yrs and <4 yrs: 24-47 months — 20 pts

≥4 yrs and <6 yrs: 48-71 months — 30 pts

≥6 yrs and <8 yrs: 72-95 months — 35 pts

≥8 yrs and <10 yrs: 96-119 months — 55 pts

≥10 yrs: 120 + months — 65 pts

Flexible Grids for the following:

2. Project Planner for Real Property

3. Claims Analyst (for Real Property)

Levels of Expertise

Senior: **Minimum 95 pts**

Intermediate: **Minimum 70 pts**

Junior: **Minimum 50 pts**

Relevant Education to the Consultant Category

University (PhD, Graduate, Undergraduate, degree): 35 pts

College or CEGEP Diploma/Certificate: 25 pts

Professional Certification

Relevant Professional Certification: 15 pts

Relevant Experience in Consultant Category

≥1 yr and <2 yrs: 12-23 months — 10 pts

≥2 yrs and <4 yrs: 24-47 months — 20 pts

≥4 yrs and <6 yrs: 48-71 months — 25 pts

≥6 yrs and <8 yrs: 72-95 months — 35 pts

≥8 yrs and <10 yrs: 96-119 months — 50 pts

≥10 yrs: 120 + months — 60 pts

4. Project Administrator for Real Property Flexible Grid

Levels of Expertise

Senior: **Minimum 95 pts**

Intermediate: **Minimum 70 pts**

Junior: **Minimum 50 pts**

Relevant Education to the Consultant Category

College or CEGEP Diploma / Certificate: 35 pts

High School Diploma: 25 pts

Professional Certification

Relevant Professional Certification: 15 pts

Relevant Experience in Consultant Category

≥1 yr and <2 yrs: 12-23 months — 10 pts

≥2 yrs and <4 yrs: 24-47 months — 20 pts

≥4 yrs and <6 yrs: 48-71 months — 25 pts

≥6 yrs and <8 yrs: 72-95 months — 35 pts

≥8 yrs and <10 yrs: 96-119 months — 50 pts

≥10 yrs: 120 + months — 60 pts

5. Financial/Cost Specialist for Real Property Flexible Grid

Levels of Expertise

Senior: **Minimum 100 pts**

Intermediate: **Minimum 80 pts**

Junior: **Minimum 65 pts**

Relevant Education to the Consultant Category

University (PhD, Graduate, Undergraduate, degree): 35 pts

College or CEGEP Diploma/Certificate: 25 pts

Professional Certification

Relevant Professional Certification: 20 pts

Relevant Experience in Consultant Category

≥1 yr and <2 yrs: 12-23 months — 10 pts

≥2 yrs and <4 yrs: 24-47 months — 20 pts

≥4 yrs and <6 yrs: 48-71 months — 30 pts

≥6 yrs and <8 yrs: 72-95 months — 45 pts

≥8 yrs and <10 yrs: 96-119 months — 55 pts

≥10 yrs: 120 + months — 65 pts

6. PROJECT LEADER FOR REAL PROPERTY FLEXIBLE GRID

Levels of Expertise

Senior: **Minimum 100 pts**

Intermediate: **Minimum 80 pts**

Junior: **Minimum 65 pts**

Relevant Education to the Consultant Category

University (PhD, Graduate, Undergraduate, degree): 35 pts

College or CEGEP Diploma/Certificate: 25 pts

Professional Certification

Relevant Professional Certification: 15 pts

Relevant Experience in Consultant Category

≥1 yrs and <2 yrs: 12-23 months — 10 pts

≥2 yrs and <4 yrs: 24-47 months — 20 pts

≥4 yrs and <6 yrs: 48-71 months — 30 pts

≥6 yrs and <8 yrs: 72-95 months — 35 pts

≥8 yrs and <10 yrs: 96-119 months — 55 pts

≥10 yrs: 120 + months — 65 pts

This flexible grid applies to all consultant categories, unless otherwise specified.

Flexible Grids for the following:

7. **Quality Assurance /Management Specialist**

8. **Risk Management Specialist**

9. **Technical Writer**

Levels of Expertise

Senior: Minimum 95 pts

Intermediate: Minimum 70 pts

Junior: Minimum 50 pts

Relevant Education to the Consultant Category

University (PhD, Graduate, Undergraduate, degree): 35 pts

College or CEGEP Diploma/Certificate: 25 pts

Professional Certification

Relevant Professional Certification : 15 pts

Relevant Experience in Consultant Category

≥1 yrs and <2 yrs: 12-23 months — 10 pts

≥2 yrs and <4 yrs: 24-47 months — 20 pts

≥4 yrs and <6 yrs: 48-71 months — 25 pts

≥6 yrs and <8 yrs: 72-95 months — 35 pts

≥8 yrs and <10 yrs: 96-119 months — 50 pts

≥10 yrs: 120 + months — 60 pts

ATTACHMENT 2 TO PART 4 TECHNICAL CRITERIA

It is recommended that the Bidder include a grid in their proposals, cross-referencing statements of compliance with the supporting data in their proposals. Note: the compliance grid, by and of itself does not constitute demonstrated evidence. The Bidder must submit a detailed CV for each of the proposed resources.

In order to obtain points for education and professional accreditations, the Bidder must include photocopies of certificates. If not provided with the bid, Bidders will be deemed non-compliant.

Interpretation of the Requirement by the Evaluation Team

1. The statements and requirements in this article apply to the information provided by the Bidder for each of its proposed personnel (*i.e. consultant(s)*).
2. To demonstrate the experience (as defined in Attachment 1 to part 4 "Experience" of personnel), the Bidder should provide complete project details as to where, when (month and year) and how (through which activities/responsibilities) the stated qualifications/experience were obtained. The Bidder is advised that only listing position or assignment titles without providing any supporting data to describe responsibilities, duties, and relevance to the requirements will not be considered "demonstrated" for the purpose of this valuation.
3. The Bidder is advised that the month(s) of valid experience listed for a project whose timeframe overlaps that of another referenced project will only be counted once. For example: Project 1 timeframe is July 2001 to December 2001; Project 2 timeframe is October 2001 to January 2002; the total months of experience for these two project references is seven (7) months.
4. The Bidder is advised that, if the experience description only contains years, and does not specify any months within the year, then a maximum of only one month of experience will be allowed by the evaluation team if the experience starts and ends in the same year; and if the experience starts and ends in different years, only one month for the beginning year and one month for the end year of the range specified.
5. For example, if the experience description states that a particular position or assignment was undertaken during:
 - (a). "2004", then only one month will be allowed for 2004, provided that the experience is applicable;
 - (b). "2004-2005", then only one month will be allowed for 2004, and one month for 2005, for a total of two months, provided that the experience is applicable;
 - (c). "2003-2005", then only one month will be allowed for 2003, and one month for 2005, and 12 for 2004, for a total of 14 months, provided that the experience is applicable. In cases where the number of years is longer, the first and last year will still be counted as one month each, provided that the experience is applicable.
6. Phrases such as "within the last sixty (60) months" are used mean "within the sixty (60) preceding the closing date of the RFP". In the event that the RFP closing date is changed after the initial publication of the RFP, the Bidder may choose to interpret the phrase as being measured from either the initial closing date or the final closing date, unless otherwise directed in an RFP amendment.

7. Phrases such as "experience working as a Manager" (or other resource category title) mean that the experience must match, to the satisfaction of the evaluation team, the requirements for such a resource category as stated in the Statement of Work provided with this RFP.
8. Phrases such as "experience dealing with matters related to the Statement of Work" mean that the experience must match, to the satisfaction of the evaluation team, the nature of the requirements for the work being done by PSPC as described throughout the Statement of Work, including but not limited to background and introductory and other descriptive information.
9. The Bidder's proposed resources must not exceed the required number per resource category and level. In some cases, more than one resource is required to be proposed for a category (e.g. five (5) Senior Project Managers are required to be proposed). In such cases, the Bidder may NOT propose the same individual for more than one of these Resource Categories. Additional resources will not be evaluated.
10. Unless otherwise stated, the Bidder's proposed individuals' experiences for the optional resources as per Table 1, sub-section 1.2, section RS 1 General Services, Annex "A" Statement of Work, will not be evaluated in the following mandatory and point-rated technical criteria.
11. Definitions:

"federal" means working within the legislative framework of the Canadian federal government.

"public sector" means municipal and/or provincial and/or federal government.

"heritage projects" means a project where the asset is either "classified" or recognised (usually older than 40 years old) and interventions were aimed at preserving the heritage aspect. In this context, the definition of heritage building shall follow the Canadian Historic Places Register or any equivalent national level designation for projects outside Canada.

1. MANDATORY TECHNICAL CRITERIA

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion must be addressed separately.

MANDATORY TECHNICAL CRITERIA (MT)

#	Description	Met/Not Met	Substantiation
MT1	<p>The Bidder must submit resumes for ALL resource categories and levels listed as Required and Optional Resources. Refer to Table 1 in sub-section 1.2, section RS 1 General Services, Annex "A" Statement of Work for a complete list.</p> <p>Any individual may be proposed for no more than ONE resource category. It is a mandatory requirement that the Bidder meet the minimum requirements of the flexible grid.</p>		
MT2	<p>Each of the two (2) proposed "Project Manager for Real Property – Senior" (SPM), excluding the SPM for Construction, must demonstrate the following:</p> <p>a) Be a certified professional engineer or architect in good standing in Canada. Photocopies of certification as proof must be submitted with the bid.</p> <p>To demonstrate proof of good standing with a professional order, Bidders must provide, in addition to clear copies of certification, a valid and clear copy of the resources membership card for the current year or other similar proof.</p>		
MT3	<p>The proposed "Project Manager for Real Property – Intermediate" (IPM) must demonstrate the following:</p> <p>a) Be a certified professional engineer or architect in good standing in Canada. Photocopies of certification as proof must be submitted with the bid.</p> <p>To demonstrate proof of good standing with a professional order, Bidders must provide, in addition to clear copies of certification, a clear and valid copy of the resources membership card for the current year or other similar proof.</p>		

MT4	The Bidder must submit information related to three (3) projects that have been completed within the last fifteen (15) years prior to the solicitation closing date, or that a minimum have attained substantial completion of construction within the last (15) years, prior to the solicitation closing date if contracts are not fully invoiced. Minimum duration for each project has to be 2 continuous years or more. Joint venture submissions are not to exceed the maximum number of projects. Only the first three (3) projects listed in sequence will receive consideration		
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2 **POINT RATED TECHNICAL CRITERIA – Written**

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

Instructions to Bidders for responding to point rated technical criteria:

1. In addressing the point rated evaluation criteria, the Bidder should supplement the information supplied in response to the rated requirements with details outlining the depth and extent of the relevant experience, qualifications and specialized expertise of the proposed resource. All claims with regard to resource experience, qualifications or expertise must be substantiated through the provision of detailed project descriptions of how and where the claimed experience, qualifications or expertise were gained. Unsubstantiated claims of experience, qualifications or expertise will not be considered by the evaluation team during the point rated evaluation.
2. The Bidder's Score will be based on the evaluation scale provided below for the following Point Rated Technical Criteria – Written (RTW):
 - RT1 – Management of Services
 - RT2 – Achievement of Bidders on Projects
 - RT3 – Achievement of Resources on Projects

The maximum number of pages (including text and graphics) to be submitted for responding to the parts RT1 and RT2 of the Point Rated Technical Criteria – Written is 10 (ten) pages (including text and graphics).

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

- RT3 - Proposed Resources CV's
- Attachment 1 to Part 3, Pricing Schedule
- Certifications and proof of education
- Integrity Provisions - Associated Information

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 PSPC Evaluation Board members for evaluation.

3. As applicable, the Bidder should indicate the location in the proposed resources' resumes of supporting information to substantiate relevant experience for each point rated evaluation criteria.
4. A pass mark of 318 points or a minimum required score of 318 points out of 489 applies to the sum of the written technical proposal (Point Rated Technical Criteria – Written). Proposals for which evaluated scores fail to achieve this pass mark, as a minimum, will be deemed non-responsive.

POINT RATED TECHNICAL CRITERIA – WRITTEN (RTW)

The Bidder:

#	Description	Max Score	DEMONSTRATED EXPERIENCE (CONTRACTOR TO INSERT DATA)	INSERT PAGE # OF RESUME (when Applicable)
RT1	<p>MANAGEMENT OF SERVICES</p> <p>The Bidder should substantiate:</p> <ol style="list-style-type: none"> a) How it proposes to organize the PMSS Team, and how the PMSS Team will fit within: <ul style="list-style-type: none"> - the firm's (or joint venture's) existing organizational structure and internal governance; <u>(30 Points)</u> - the Project Team identified in section PA 2 of Annex "A" – Statement of Work. <u>(30 Points)</u> b) How it proposes to effectively manage communication between the PMSS Team and the members of the Project Team identified in section PA 2 of Annex "A" – Statement of Work. <u>(30 Points)</u> c) Its proposed methods for preventing financial disputes/claims against PSPC by A&E consultant firms and construction firms. <u>(30 Points)</u> d) Its proposed quality management processes that will be in place for this requirement. <u>(30 Points)</u> <p>Submissions will be scored in the following manner:</p> <p>➤ he Generic Evaluation Table at the end of Attachment 2 to Part 4 – Technical Criteria will be used to evaluate each of the criterion in this section RT1.</p>	150 Points		
RT2	<p>ACHIEVEMENTS OF BIDDER ON PROJECTS</p> <p>The intent of this section RT2 is to evaluate the Bidder's accomplishments, achievements, and experience in the project management, planning, and delivery of real property projects which should be of similar scope, complexity, and scale as the projects stated in Annex "A" Statement of Work. This will be evaluated using criterion RT2.1 to RT2.4 below.</p>	150 Points		

RT2.1	<p>Bidders must substantiate the experience using the three (3) projects submitted as part of MT4. A combination of information from these three (3) projects can be used in response to the criterion below.</p> <p>The Bidder should substantiate that one of the projects submitted as part of MT4 included project management services and had a contract value for project management services of \$5 million or higher. <u>(15 Points)</u></p> <p>Submissions will be scored in the following manner:</p> <ul style="list-style-type: none"> ➤ Contract included relevant project management support services and the contract value is under \$1m = 0 points ➤ Contract included relevant project management support services and the contract value is between \$1m and \$2.5m = 3 points ➤ Contract included relevant project management support services and the contract value is between \$2.5m and \$5m = 6 points ➤ Contract included relevant project management support services and the contract value is of \$5m or higher = 15 points 			
RT2.2	<p><u>One of the projects submitted by the Bidder as part of MT4 should have a project dollar value of \$50 million or higher. <u>(15 Points)</u></u></p> <p>Submissions will be scored in the following manner:</p> <ul style="list-style-type: none"> ➤ Project value under \$10m = 0 points ➤ Project value between \$10m and \$25m = 3 points ➤ Project value between \$25m and \$50m = 6 points ➤ Project value of \$50m or higher = 15 points 			
RT2.3	<p><u>Information to be supplied for each project submitted by the Bidder as part of MT4 should include, the following: <u>(30 Points)</u></u></p> <p><u>Information to be supplied for each project submitted by the Bidder as part of MT4 should include, the following: <u>(30 Points)</u></u></p> <ol style="list-style-type: none"> 1. Title of the project / program; 2. Name of the client; 3. Location; 4. Duration (start and completion dates – minimum 2 years); 5. Scope summary (short description); 6. Final cost of the project; 7. Value of the Bidder's contract for real property project management services; 			

RT2.4	<p>8. Role of the Bidder in the project;</p> <p>9. Responsibilities of principals on the project; and</p> <p>10. Client references - name, address, phone, and email of client contact at working level - references may be checked.</p> <p>Submissions will be scored in the following manner:</p> <ul style="list-style-type: none"> ➤ Two (2) points per project will be awarded for each of items number 5 to 9 that is clearly identified (<i>i.e.</i> 2 points per item per project, for a maximum of 30 points). ➤ If any of items 1, 2, 3, 4 or 10 is missing, 5 points per project will be deducted. <p><u>One of the projects submitted by the Bidder as part of MT4 should also clearly substantiate their experience pertinent to:</u></p> <p>a) Bidder's experience to manage rehabilitation project(s) in heritage building(s) over a continuous duration of two (2) years or longer. <u>(15 Points)</u></p> <p>Submissions will be scored in the following manner:</p> <ul style="list-style-type: none"> ➤ Substantiated relevant experience for two (2) years or more = 15 points ➤ Substantiated relevant experience for less than two (2) years = 0 points <p>b) <u>Bidder's experience to manage project(s) related to the renovation or construction of a building in the public sector over a continuous duration of two (2) years or longer.</u> <u>(15 Points)</u></p> <p>Submissions will be scored in the following manner:</p> <ul style="list-style-type: none"> ➤ Substantiated relevant experience for two (2) years or more = 15 points ➤ Substantiated relevant experience for less than two (2) years = 0 points <p>c) <u>Bidder's experience over a continuous duration of two (2) years or longer within a Program of Work context with multiple contracts, with numerous inter-related projects underway at the same time, and at various stages of advancement.</u> <u>(15 Points)</u></p> <p>Submissions will be scored in the following manner:</p> <ul style="list-style-type: none"> ➤ Substantiated relevant experience for two (2) years or more = 15 points ➤ Substantiated relevant experience for less than two 			
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	<p>(2) years = 0 points</p> <p>d) <u>Bidder's experience in managing project(s) within demanding environments (e.g. high visibility, public setting, multiple stakeholders, time pressure, etc.) over a continuous duration of two (2) years or longer. (15 Points)</u></p> <p>Submissions will be scored in the following manner:</p> <ul style="list-style-type: none"> ➤ Substantiated relevant experience for two (2) years or more = 15 points ➤ Substantiated relevant experience for less than two (2) years = 0 points <p>e) <u>Bidder's experience in managing project(s) with multiple conflicting objectives (e.g. heritage conservation, security requirements, sustainability targets, etc.) over a continuous duration of two (2) years or longer. (15Points)</u></p> <p>Submissions will be scored in the following manner:</p> <ul style="list-style-type: none"> ➤ Substantiated relevant experience for two (2) years or more = 15 points ➤ Substantiated relevant experience for less than two (2) years = 0 points <p>f) <u>Bidder's experience over a continuous duration of two (2) years or longer in managing project(s) in an occupied building, with construction occurring at the same time as the building was being used by tenants. (15 Points)</u></p> <p>Submissions will be scored in the following manner:</p> <ul style="list-style-type: none"> ➤ Substantiated relevant experience for two (2) years or more = 15 points ➤ Substantiated relevant experience for less than two (2) years = 0 points 			
RT3	<p>ACHIEVEMENTS OF RESOURCES ON PROJECTS</p> <p><u>For each of the following Required Resources proposed by the Bidder that meet the minimum points from the Flexible Grid in Attachment 1 to Part 4, the Bidder should clearly substantiate experience that is pertinent to the following criteria, and that has been acquired over a duration of at least two (2) years within the past fifteen (15) years prior to the solicitation closing date.</u></p> <p>Submissions will be scored in the following manner:</p>	189 Points		

	<ul style="list-style-type: none"> • For each criterion (<i>i.e.</i> (a), (b), (c), and d) listed under each of the Required Resource categories identified in RT3: <ul style="list-style-type: none"> ➤ Substantiated relevant experience for two (2) years or more = full points ➤ Substantiated relevant experience for less than two (2) years = 0 points <p>3.1 Project Leader for Real Property – Senior:</p> <ul style="list-style-type: none"> a) Experience working as a “Project Leader for Real Property – Senior” in real property projects of similar scope and complexity as the projects stated in Annex “A” Statement of Work. <u>(9 Points)</u> b) Experience working as a “Project Leader” on projects valued over \$50M. <u>(6 Points)</u> c) Experience working as a “Project Leader” on <i>public sector</i> projects. <u>(6 Points)</u> d) Experience working as a “Project Leader” on <i>heritage projects</i> valued over \$10M. <u>(6 Points)</u> <p>3.2 Project Manager for Real Property – Senior #1 (as per the Flexible Table in Attachment 1 To Part 4):</p> <ul style="list-style-type: none"> a) Experience working as a “Project Manager – Senior” in real property projects of similar scope and complexity as the projects stated in Annex “A” Statement of Work. <u>(6 Points)</u> b) Experience working as a “Project Manager” on projects valued over \$50M. <u>(6 Points)</u> c) Experience working as a “Project Manager” on <i>public sector</i> projects. <u>(6 Points)</u> d) Experience working as a “Project Manager” on <i>heritage projects</i> valued over \$10M. <u>(6 Points)</u> <p>3.3 Project Manager for Real Property – Senior #2 (as per the Flexible Table in Attachment 1 To Part 4):</p> <ul style="list-style-type: none"> a) Experience working as a “Project Manager – Senior” in real property projects of similar scope and complexity as the projects stated in Annex “A” Statement of Work. <u>(6 Points)</u> b) Experience working as a “Project Manager” on projects valued over \$50M. <u>(6 Points)</u> c) Experience working as a “Project Manager” on <i>public sector</i> projects. <u>(6 Points)</u> d) Experience working as a “Project Manager” on <i>heritage projects</i> valued over \$10M. <u>(6 Points)</u> <p>3.4 Project Manager for Real Property – Construction-Senior (as per the Flexible Table in Attachment 1 To Part 4):</p> <ul style="list-style-type: none"> a) Experience working as a “Project Manager – Senior” in real property projects of similar scope and complexity as the projects stated in Annex “A” Statement of Work. <u>(6 Points)</u> b) Experience working as a “Project Manager” on projects 			
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	<p>valued over \$50M. <u>(6 Points)</u></p> <p>c) Experience working as a “Project Manager” on <i>public sector</i> projects. <u>(6 Points)</u></p> <p>d) Experience working as a “Project Manager” on <i>heritage projects</i> valued over \$10M. <u>(6 Points)</u></p> <p>3.5 Project Managers for Real Property – Intermediate (as per the Flexible Table in Attachment 1 To Part 4):</p> <p>a) Experience working as a “Project Manager” in real property projects of similar scope and complexity as the projects stated in Annex “A” Statement of Work. <u>(6 Points)</u></p> <p>b) Experience working as a “Project Manager” on projects valued over \$10M. <u>(6 Points)</u></p> <p>c) Experience working as a “Project Manager” on <i>public sector</i> projects. <u>(6 Points)</u></p> <p>3.6 Project Administrator for Real Property – Intermediate #1 (as per the Flexible Table in Attachment 1 To Part 4):</p> <p>a) Experience working as a “Project Administrator” in real property projects of similar scope and complexity as the projects stated in Annex “A” Statement of Work. <u>(6 Points)</u></p> <p>b) Experience working as a “Project Administrator” on projects valued over \$10M. <u>(6 Points)</u></p> <p>c) Experience working as a “Project Administrator” on <i>public sector</i> projects. <u>(6 Points)</u></p> <p>3.7 Project Administrator for Real Property – Intermediate #2 (as per the Flexible Table in Attachment 1 To Part 4):</p> <p>a) Experience working as a “Project Administrator” in real property projects of similar scope and complexity as the projects stated in Annex “A” Statement of Work. <u>(6 Points)</u></p> <p>b) Experience working as a “Project Administrator” on projects valued over \$10M. <u>(6 Points)</u></p> <p>c) Experience working as a “Project Administrator” on <i>public sector</i> projects. <u>(6 Points)</u></p> <p>3.8 Financial/Cost Specialist for Real Property – Intermediate (as per the Flexible Table in Attachment 1 To Part 4):</p> <p>a) Experience working as a “Financial/Cost Specialist” in real property projects of similar scope and complexity as the projects stated in Annex “A” Statement of Work. <u>(6 Points)</u></p> <p>b) Experience working as a “Financial/Cost Specialist” on projects valued over \$10M. <u>(6 Points)</u></p> <p>c) Experience working as a “Financial/Cost Specialist” on <i>public sector</i> projects. <u>(6 Points)</u></p> <p>3.9 Project Planner for Real Property – Intermediate (as per the Flexible Table in Attachment 1 To Part 4):</p> <p>a) Experience working as a “Project Planner for Real Property”</p>			
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	in real property projects of similar scope and complexity as the projects stated in Annex "A" Statement of Work. <u>(6 Points)</u>			
	b) Experience working as a "Project Planner for Real Property" on projects valued over \$10M. <u>(6 Points)</u>			
	c) Experience working as a "Project Planner for Real Property" on <i>public sector</i> projects. <u>(6 Points)</u>			

Point Rated Technical Criteria Evaluation Scale:

Point Rated Technical Criteria and Scores	Required Minimum Number of Points	Maximum Number of Points
Technical Proposal – Written (RTW)	318 points	489

	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
	Bidder do not possess qualifications and experience	Bidder lacks qualifications and experience	Bidder has an acceptable level of qualifications and experience	Bidder is qualified and experienced	Bidder 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
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Generic Evaluation Table

PSPC Evaluation Board members will use the generic evaluation table below to evaluate the strengths and weaknesses of the Bidder's response to evaluation criterion RT1. This criterion will be rated with even numbers (0, 2, 4, 6, 8 or 10) and then multiplied by its respective weighting.

ATTACHMENT 3 TO PART 4 – INDIGENOUS BENEFITS PLAN (IBP)

As part of Canada's commitment to support its Indigenous First Nations population, this procurement contains a point rated Indigenous Benefits Plan (IBP) that aims to provide socio-economic benefits to Indigenous Peoples and Indigenous Firms in Canada. As a result, bidders must submit a draft IBP as part of their RFP response.

Over the term of the contract, the IBP is intended to develop long-term, meaningful, lasting, sustainable benefits for Indigenous professionals and Indigenous businesses in the fields of the Project Management Support Services in the various resource categories required for this project.

The IBP covers direct and non-direct benefits. For this RFP, direct benefits refers to Indigenous employment, including opportunities as the Contractor, one of its Sub-Contractors, or employees and/or personnel within the Bidder's team members. Non-direct benefits refer to measures where there is a lack of Indigenous Resources or a lack of Indigenous Business capacity that can be developed with specialized training, internships and/or apprenticeships among others.

The Contractor will be expected to report on its results related to the implementation of its IBP based on the template report listed in Annex F and submitted to Canada every six (6) months.

DEFINITIONS

Indigenous Business Capacity:

To assist in identifying Indigenous business capacity, for contracting or subcontracting purposes, bidders may consider reviewing the list of Indigenous businesses registered in the following links such as the Indigenous Business Directory (IBD). A link to the database has been provided below:
http://www.ic.gc.ca/eic/site/ccc_bt-rec_ec.nsf/eng/h_00011.html

In addition to the IBD, other directories are available for Indigenous Businesses including:

- Canadian Council for Indigenous Business www.ccab.com
- Province of Ontario Indigenous Directory
<https://www.lrcsde.lrc.gov.on.ca/Indigenousbusinessdirectory/>

The Secrétariat aux affaires autochtones du Québec offers a listing of contacts for Aboriginal communities of Québec: http://www.autochtones.gouv.qc.ca/nations/liste_communautes_en.htm

Canadian universities and colleges also have Indigenous Programs that bidders may consider consulting.

Indigenous Business definition:

For the purpose of this IBP, an Indigenous Business can be:

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

Indigenous Person definition:

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

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

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

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

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

INDIGENOUS BENEFITS

1- Human Resources Plan Benefiting Indigenous Peoples

The IBP should include a Human Resource Plan that details how the Bidder intends to maximize the use of Indigenous employment within the fields of Project Management Support Services (refer to “Attachment 1 to part 4” and “RS 1 – General Services”).

The Human Resource Plan should address how the employment of Indigenous Peoples will be managed.

The Human Resource Plan should:

- 1- Identify the Indigenous team members currently within the Bidder Team/their qualifications/their position;
- 2- Provide the strategies to recruit and retain Indigenous persons. For example:
 - Collaborating with universities and colleges to offer internships to Indigenous Students;
 - Establishing a representative workforce policy and encourage voluntary self-identification
 - Creating partnerships with Indigenous organizations to enhance recruitment of Indigenous persons through specialized Indigenous recruitment programs
 - Undertaking Indigenous outreach through Indigenous educational and employment events
 - Putting in place an Indigenous employee network and support inclusion of Indigenous cultural practices
- 3- Ensure leaders in the organization are equipped to support Indigenous employees. For example, provide Indigenous Awareness training for supervisors and managers.

2- Business Plan Benefiting Indigenous Firms (including subcontracting)

The IBP should include a Business Plan that details how the Bidder intends to maximize the use of Indigenous firms within the fields of Project Management Support Services (refer to “Attachment 1 to part 4” and “RS 1 – General Services”).

The Business Plan should:

- 1– Identify the work intended to be carried out by Indigenous firms, as well as the dollar value of the Goods or Services, (For example, Services may include engineers, architects, administrators, accounting services, administrative support services, IT support services, etc. and Goods may include office supplies, computing and telecommunication devices, etc.)
- 2– Detail how business with Indigenous firms will be managed and
- 3- Detail on any development of new capabilities that support project activities in Annex A.

3- Training and Skills Development Plan Benefiting Indigenous Peoples

The IBP should include a Training and Skills Development Plan that details how the Bidder intends to maximize the training and skills development of Indigenous persons within the fields of Project Management Support Services (refer to “Attachment 1 to part 4” and “RS 1 – General Services”).

The Training and Skills Development Plan should address the use of:

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

4- Other Measures Benefiting Indigenous Peoples or Indigenous Communities

The IBP should include other relevant measures that the Bidder intends to elaborate/implement to maximize the use of Indigenous employment/firms/persons within the fields of Project Management Support Services (refer to “Attachment 1 to part 4” and “RS 1 – General Services”).

Other relevant measures could include, but not limited to Indigenous economic development initiatives, Indigenous Community outreach, scholarships to encourage Indigenous youth to enter into the Project Management Support Services and other financial or economic investments to help Indigenous Peoples or Indigenous communities in meeting their social and economic development needs.

Scoring:

Where the Bidder has provided information materially responding to all criteria listed above, the assigned score will be five (5) points (Accounting for a maximum of 5% of the overall Score).

Where any criteria is missing or deemed materially unresponsive, the assigned score will be zero (0)

IMPORTANT:

The maximum number of pages (including text and graphics) to be submitted for responding to the IBP is 10 (ten) pages.

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period. The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

5.1.1 Integrity Provisions – Declaration of Convicted Offences

In accordance with the [Integrity Provisions of the Standard Instructions](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html), all bidders must provide with their bid, if applicable, the Integrity declaration form available on the Forms for the Integrity Regime website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications Precedent to Contract Award and Additional Information

The required certifications and additional information below should be submitted with the bid but may be submitted afterwards. If the required certifications and additional information are not submitted with the bid, the Contracting Authority will inform the Bidder of a time frame within which they must be submitted by the Bidder. Failure to provide the required certifications and additional information within the time frame specified will render the bid non-responsive.

5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Federal Contractors Program for Employment Equity – Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder 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](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).

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

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

The Bidder must provide the Contracting Authority with a completed Federal Contractors Program for Employment Equity certification before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority before contract award with a completed Federal Contractors Program for Employment Equity certification for each member of the Joint Venture. Attachment 1 to Part 5, Additional Certifications Precedent to Contract Award, includes a copy of the certification to provide.

5.3 Additional Certifications Precedent to Contract Award

5.3.1 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability.

5.3.2 Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

ATTACHMENT 1 TO PART 5

ADDITIONAL CERTIFICATIONS REQUIRED PRECEDENT TO CONTRACT AWARD

1. Federal Contractors Program For Employment Equity – Certification

I, the Bidder, 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 bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit the [Employment and Social Development Canada \(ESDC\) – Labour's website \(https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html\)](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html).

Date:_____ Instructions to the Bidder:(YYYY/MM/DD) If left blank, the date will be deemed to be the bid solicitation closing date.

Instructions to the Bidder: Complete both A and B.

A. Instructions to the Bidder: Check only one of the following:

- ☐ A1. The Bidder certifies having no work force in Canada.
- ☐ A2. The Bidder certifies being a public sector employer.
- ☐ A3. The Bidder certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
- ☐ A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and / or permanent part-time employees.
- ☐ A5. The Bidder certifies having a combined workforce in Canada of 100 or more permanent full-time and/or permanent part-time employees.
- ☐ A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC–Labour.
or
- ☐ A5.2. The Bidder certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to ESDC–Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC–Labour.

B. Instructions to the Bidder: Check only one of the following:

- ☐ B1. The Bidder is not a Joint Venture.
or
- ☐ B2. The Bidder is a Joint venture. Instructions to the Bidder: Refer to the Joint Venture section of the Standard Instructions. If the Bidder is a Joint Venture, it must provide the Contracting Authority before contract award with a completed Federal Contractors Program for Employment Equity certification for each member of the Joint Venture.

PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirement

6.1.1 Before award of a contract, the following conditions must be met:

- a) the Bidder must hold a valid organization security clearance as indicated in Part 7 – Resulting Contract Clauses;
- b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 7 – Resulting Contract Clauses;
- c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites (as applicable, insert: " ." or " ;")

If the information is not provided in or with the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

6.1.2 Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.

6.1.3 For additional information on security requirements, Bidders should consult the "Security Requirements for PSPC Bid Solicitations – Instructions for Bidders" (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) document on the Departmental Standard Procurement Documents website.

Employee Information for Security

The Bidder should specify the following information regarding employees proposed in Part 4 (Technical Bid) to provide services against any resulting contract:

LEGAL NAME (First and Last)	DATE OF BIRTH	CURRENT CLEARANCE HELD

6.2 Financial Capability

SACC Manual clause A9033T (2012-07-16), Financial Capability

PART 7 – RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

1. Statement of Work

- The Contractor must perform the Work in accordance with the Statement of Work in Annex A.
- The Contractor grants to Canada the irrevocable option to acquire the services referred to in section RS 1 General Services 1.2.7 to 1.2.11 of the Statement of Work in Annex A_of the Contract under the same conditions and at the prices and/or rates stated in the Contract. The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment.
- The Contracting Authority may exercise the option at any time before the expiry of the Contract by sending a written notice to the Contractor.

1.1 Task Authorizations

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

1.1.2 Task Authorization Process

- 1.1.2.1 The Project Authority will provide the Contractor with a description of the task using the "Task Authorization" form specified in Annex E.
- 1.1.2.2 The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis (bases) and methods of payment as specified in the Contract.
- 1.1.2.3 The Contractor must provide the Project Authority, within 7 calendar days of its receipt, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.
- 1.1.2.4 The Contractor must not commence work until a TA authorized by the Project Authority has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.

1.1.3 Task Authorization Limit

- 1.1.3.1 The Project Authority may authorize individual task authorizations up to a limit of \$250,000.00, applicable Taxes included, inclusive of any revisions. Any task authorization to be issued in excess of that limit must be authorized by the Contracting Authority before issuance.

1.1.4 Minimum Work Guarantee – All the Work – Authorized TAs

- 1.1.4.1 "Maximum Contract Value" means the sum specified in Contract clause 6.2.1 (Canada's Total Liability, Cumulative Total of all authorized TAs; and "Minimum Contract Value" means a fixed amount of \$200,000.00.
- 1.1.4.2 Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 1.1.4.3 of this clause. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work. Canada's maximum liability for Work requested in authorized TAs, performed by the Contractor and accepted by Canada must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
- 1.1.4.3 In the event that Canada does not request Work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the cost of the Work requested in authorized TAs, performed by the Contractor and accepted by Canada.
- 1.1.4.4 Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

1.1.5 Periodic Usage Reports – Contracts with TAs

- 1.1.5.1 The Contractor must compile and maintain records on its provision of services to the federal government under authorized Task Authorizations issued under the Contract.
- 1.1.5.2 The Contractor must provide this data in accordance with the reporting requirements detailed below or in Annex E. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "nil" report.
- 1.1.5.3 The data must be submitted on a quarterly basis to the Contracting Authority. The quarterly periods are defined as follows:
- 1st quarter: April 1 to June 30;
2nd quarter: July 1 to September 30;
3rd quarter: October 1 to December 31; and
4th quarter: January 1 to March 31.
- 1.1.5.4 The data must be submitted to the Contracting Authority no later than 15 calendar days after the end of the reporting period.

Reporting Requirement– Details

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

For each authorized task:

- i. the authorized task number or task revision number(s);
- ii. a title or a brief description of each authorized task;
- iii. the total estimated cost specified in the authorized Task Authorization (TA) of each task, exclusive of applicable Taxes;
- iv. the total amount, exclusive of applicable Taxes, expended to date against each authorized task;

- v. the start and completion date for each authorized task; and
- vi. the active status of each authorized task, as applicable.

For all authorized tasks:

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

2. Standard Clauses and Conditions

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

2.1 General Conditions

2035 (2018–06–21), General Conditions – Higher Complexity – Services, apply to and form part of the Contract.

2.2 Specific Persons

The Contractor must provide the services of the specific persons identified in Annex B, Basis of Payment to perform the Work as stated in the Contract.

3. Security Requirement

3.1 The following security requirement (SRCL and related clauses provided by the [Contract Security Program](#)) apply and form part of the Contract:

- 1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Facility Security Clearance at the level of SECRET, issued by the Canadian Industrial Security Directorate (CISD), **Public Works and Government Services Canada (PWGSC)**.
- 2. The Contractor/Offeror personnel requiring access to CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of SECRET, granted or approved by CISD/PWGSC.
- 3. The Contractor/Offeror MUST NOT remove any CLASSIFIED information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
- 4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
- 5. The Contractor/Offeror must comply with the provisions of the:
 - (a) Security Requirements Check List and security guide (if applicable), attached at Annex C
 - (b) *Industrial Security Manual* (Latest Edition).

3.2 The Company Security Officer (CSO) must ensure through the [Contract Security Program](#) that the Contractor and proposed individuals hold a valid security clearance at the required level.

4. Term of Contract

4.1 Period of the Contract

The period of the Contract is from date of Contract to _____, inclusive.

4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three (3) additional two-year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least 30 calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

4.3 Option to Extend – Transition Period

The Contractor acknowledges that the nature of the services provided under the Contract requires continuity and that a transition period may be required at the end of the Contract. The Contractor agrees that Canada may, at its discretion, extend the Contract by a period of up to 120 days under the same conditions to ensure the required transition. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

The Contracting Authority will advise the Contractor of the extension by sending a written notice to the Contractor at least 30 calendar days before the contract expiry date. The extension will be evidenced for administrative purposes only, through a contract amendment.

5. Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:
Hakim Ghoumrassi
Supply Team Leader
Public Works and Government Services Canada
Real Property Contracting Directorate
Telephone: 819-664-7321
E-mail address: Hakim.Ghoumrassi@tpsgc-pwgsc.gc.ca

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

5.2 Project Authority

The Project Authority for the Contract is:
(Fill in at time of contract award.)

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Name : _____
Title : _____
Organisation : _____
Address: _____
Telephone: ____- ____- ____
Fax : ____- ____- ____
E-mail : _____

In absence, the Project Authority is :

Name : _____
Title : _____
Organisation : _____
Address: _____
Telephone: ____- ____- ____
Fax : ____- ____- ____
E-mail : _____

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority; however, the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

5.3 Contractor's Representative

The Contractor's Representative for the Contract is:
(Fill in at time of contract award.)

6. Basis of Payment

Firm Lot Price TA

When the applicable basis of payment specified in a TA authorized and issued under the Contract is firm lot price, in consideration of the Contractor satisfactorily completing all of its obligations under the authorized TA, the Contractor will be paid the firm lot price stipulated in the authorized TA, as determined in accordance with the basis of payment cost elements in Annex B. Customs duties are included and applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work specified in the authorized TA, unless they have been authorized, in writing, by the Contracting Authority before their incorporation into the Work specified in the authorized TA.

or

Ceiling Price TA

For the Work described in section(s)_____ of the Statement of Work in Annex A.

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Annex B to a ceiling price of \$_____. Customs duty are included and applicable Taxes are extra.

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The ceiling price is subject to downward adjustment so as not to exceed the actual costs reasonably incurred in the performance of the Work and computed in accordance with the Basis of Payment.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

or

TA subject to a Limitation of Expenditure

When the basis of payment specified in a TA authorized and issued under the Contract is limitation of expenditure, the Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the authorized TA, as determined in accordance with the basis of payment cost elements, in Annex B, to the limitation of expenditure specified in the authorized TA.

Canada's total liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized TA. Customs duties are included and applicable Taxes are extra.

No increase in the liability of Canada or in the price of the Work specified in the authorized TA resulting from any design changes, modifications or interpretations of the Work specified in the authorized TA will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been authorized, in writing, by the TA Authority before their incorporation into the Work specified in the authorized TA. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written authorization of the TA Authority. The Contractor must notify the TA Authority in writing as to the adequacy of this sum:

- (a) when it is 75 percent committed, or
- (b) four (4) months before the final delivery date specified in the authorized TA, or
- (c) as soon as the Contractor considers that the authorized TA funds are inadequate for the completion of the Work specified in the authorized TA,

whichever comes first.

If the notification is for inadequate authorized TA funds, the Contractor must provide to the TA Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

7. Limitation of Expenditure – Cumulative Total of all Authorized TAs

- 7.1 Canada's total liability to the Contractor under the Contract for all authorized TAs, inclusive of any revisions, must not exceed the sum of \$ _____. Customs duties are included and the applicable Taxes are extra.
- 7.2 No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
- 7.3 The Contractor must notify the Contracting Authority, in writing, as to the adequacy of this sum:
 - (a) when it is 75 percent committed, or
 - (b) four (4) months before the Contract expiry date, or

- (c) as soon as the Contractor considers that the sum is inadequate for the completion of the Work required and requested in all authorized TAs, inclusive of any revisions,

whichever comes first.

- 7.4 If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

8. Methods of Payment – Authorized TA

One, several or all of the following methods of payment will form part of the authorized TA:

Single Payment
(SACC Manual clause H1000C)

or

Milestone Payments
(SACC Manual clause H3009C or H3010C, as applicable; and include the schedule of milestones in the annex: "Task Authorization Form")

or

Progress Payments (using Progress Claim Form PWGSC–TPSGC 1111) (SACC Manual clause H1003C)

or

Monthly Payments
(SACC Manual clause H1008C)

8.1 SACC Manual Clauses

The following clauses apply to and form part of the Contract:

A9117C (2007–11–30), T1204 – Direct Request by Customer Department
C2000C (2007–11–30), Taxes – Foreign-based Contractor
C2605C (2008–05–12), Canadian Customs Duties and Sales Tax – Foreign-based Contractor
A9116C (2007–11–30), T1204 Information Reporting by Contractor
C0705C (2010–01–11), Discretionary Audit, apply to and form part of the Contract.

8.2 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instruments:

- a) Visa Acquisition Card;
- b) MasterCard Acquisition Card;
- c) Direct Deposit (Domestic and International);
- d) Electronic Data Interchange (EDI);
- e) Wire Transfer (International Only);
- f) Large Value Transfer System (LVTS) (Over \$25M)

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8.3 Invoicing Instructions

H5001C (2008-12-12) Invoicing Instructions,

or

H3022C (2016-01-28) Invoicing Instructions - Progress Payment Claim - Supporting Documentation required,

or

H3024C (2016-01-28) Invoicing Instructions - Progress Payment Claim - Supporting Documentation not required

9. Certifications and Additional Information

9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

9.2 Federal Contractors Program for Employment Equity – Default by the Contractor

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

10. Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

11. Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- a. the Articles of Agreement;
- b. the general conditions 2035 (2018–06–21) - General Conditions – Higher Complexity – Services;
- c. Annex A, Statement of Work;
- d. Annex B, Basis of Payment;
- e. Annex C, Security Requirements Check List;
- f. Annex D, Insurance Requirements;
- g. Annex E, Task Authorization Form
- h. Annex F, Template for Reporting on the Results of the Indigenous Benefits Plan (IBP)**
- i. the signed Task Authorizations (including all of its annexes, if any); and
- j. the Contractor's bid dated _____, as clarified on _____ (year–month–day)" "and" " , as amended on _____(year–month–day).)

12. Insurance – Specific Requirements

The Contractor must comply with the insurance requirements specified in Annex D. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. For Canadian-based Contractors, coverage must be placed with an Insurer licensed to carry out business in Canada, however, for Foreign-based Contractors, coverage must be placed with an Insurer with an A.M. Best Rating no less than "A-". The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

13 A3025C (2013–03–21), Proactive Disclosure of Contracts with Former Public Servants, if applicable.

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

14 Government Site Regulations

The Contractor must comply with all regulations, instructions and directives in force on the site where the Work is performed.

15 Indigenous Benefits Plan Implementation and Reporting

Within 60 days after Contract Award, the Contractor must submit to the Crown for approval a finalized Indigenous Benefits Plan (IBP) to include, at a minimum, the draft IBP submitted with the bid proposal. Based on the finalized IBP, Canada may negotiate an Incentive Program with established targets for Indigenous Benefits, the type/value will be solely at the Crown's discretion and negotiated post Contract Award.

Also, the Contractor will be expected to submit two reports each year demonstrating results against the Indigenous Benefits Plan as per criteria established in Annex F. These reports must provide details of the IBP results during each respective period: the first detailing results achieved in the first six (6) months of the year and the second detailing results achieved in the last six (6) months of the year. The first report must be submitted within 30 days after the mid-year mark and the second must be submitted within 30 days after the end of the year.

As per the reporting template provided in Annex F, the Contractor will be expected to provide details of efforts and results related to Labour, Training, Goods and Services acquired from Indigenous Firms (including Subcontracting) as well as for Other Measures Benefiting Indigenous Communities.

Should the Contractor's IBP Report not provide sufficient information to measure the Contractor's results against its implementation of the IBP, Canada may impose penalties in the order of hold-backs up to 5% of the total contract value.

Human Resources:

The IBP should be supported by a list of specific positions that may or will be staffed by members of Indigenous Peoples: i.e., through the direct employment of Indigenous Peoples by the Contractor in carrying out the work of the contract. Examples can include but are not limited to: administrative roles, management roles, technical support roles or any other function or activity in support of project activities as listed in Annex A.

Indigenous employment will be confirmed during the project based on supporting documentation provided by the Contractor to the Project Authority if applicable.

Training and Skills Development:

Contractor will be evaluated on their undertaking of a commitment with respect to delivery of on-the-job training programs for Indigenous Peoples at no additional cost under the Contract.

Business Plan Benefiting Indigenous Firms (including subcontracting):

Contractor will be evaluated on their commitment to acquire goods and/or services from Indigenous Firms as defined below. Examples of goods and services can include, but are not limited to office supplies, office furniture, software, laptops, cellular telephones and other technological devices used by the Contractor's personnel or PMSS resources supporting PSPC projects as identified in Annex A. For the purposes of this requirement, an Indigenous Firm is defined as a sole proprietorship, limited company, co-operative, partnership, or not-for-profit organization. To be considered an Indigenous Firm the following criteria must be met:

- at least 51 per cent of the firm is owned and controlled by an Indigenous Person or Indigenous Firm, and
- at least one third of the firm's employees, if it has six or more full-time staff, must be from an Indigenous Firm.

If a firm is starting a joint venture, at least 51 per cent of the joint venture must be controlled and owned by an Indigenous Firm, as defined above.

Other Measures Benefiting Indigenous Peoples or Indigenous Communities:

Contractor will be evaluated on their commitment to elaborate/implement other measures to maximize the use of Indigenous employment/firms/persons within the fields of Project Management Support Services (refer to "Attachment 1 to part 4" and "RS 1 – General Services").

Other relevant measures could include, but not limited to, specialized training, career development, scholarships and community outreach to encourage Indigenous youth to enter into the Project Management Support Services and help Indigenous Peoples or Indigenous communities in meeting their social and economic development needs.

ANNEX A STATEMENT OF WORK

PROGRAM REQUIREMENTS – (PR)

- PR 1 Program Information
 - 1.1 Program Identification
 - 1.2 Terminology
- PR 2 Program Introduction and Background
 - 2.1 Introduction
 - 2.2 Background – SPIB Senate Accommodation Program
 - 2.3 Constraints and Challenges
- PR 3 Program Objectives
- PR 4 Heritage Character
- PR 5 Existing Documentation
- PR 6 Project Management Support Services Team

PROJECT ADMINISTRATION (PA)

- PA 1 General Requirements**
 - 1.1 PSPC Program and Project Management
 - 1.2 Correspondence Protocol
 - 1.3 Media
 - 1.4 Security Related to Program and Project Information
 - 1.5 Anticipated Level of Effort
 - 1.6 Scheduling Work
 - 1.7 Project Deliverables
 - 1.8 Acceptance of PMSS Deliverables
 - 1.9 Response Time
 - 1.10 Program and Project Meetings
 - 1.11 Risk Management Sessions
 - 1.12 Accommodations
 - 1.13 Construction Activity and Review
 - 1.14 Change Management
- PA 2 Project Team**
 - 2.1 Project Team Organization
 - 2.2 Roles and Responsibilities of the Project Team
- PA 3 Submissions, Reviews and Approval Process**
 - 3.1 Authorities Having Jurisdiction
 - 3.2 Health and Life Safety
- PA 4 PSPC National Project Management System (NPMS) Model**

REQUIRED SERVICES (RS)

- RS 1 General Services**
 - 1.1 Scope and Activities
 - 1.2 Typical Requires Services (RS) Support Activities
- RS 2 Project Planning Phase**

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- 2.1 Scope and Activities
- 2.2 Deliverables

RS 3 Project Design Phase

- 3.1 Scope and Activities
- 3.2 Deliverables

RS 4 Project Implementation Phase

- 4.1 Scope and Activities
- 4.2 Deliverables

RS 5 Project Delivery Close-Out Phase

- 5.1 Scope and Activities
- 5.2 Deliverables

PROGRAM REQUIREMENTS

PR 1 PROGRAM INFORMATION

1.1 Program Identification

PSPC Project Title:	SPIB LTVP Accommodation Program.
Location of the Project:	Ottawa, Ontario
Owner:	PSPC, Science and Parliamentary Infrastructure Branch (SPIB)
Clients/ Users:	Senate of Canada & Library of Parliament

1.2 Terminology

The following terms are used in this document:

<i>A&E Consultant / A&E Team</i>	The architectural, interior design and engineering teams including specialist consultants in contract with PSPC for A&E services for the various program projects.
<i>BCC</i>	Building Components and Connectivity including information technology, multi-media, security components and systems, furniture, built-in furniture and equipment.
<i>Client / Users</i>	The Senate of Canada, Library of Parliament are the primary facility occupants.
<i>LTVP</i>	Long Term Vision and Plan of the Parliamentary Precinct.
<i>NPMS</i>	National Project Management System that is the project management system and set of processes used by PSPC and also mandated by Treasury Board.
<i>Owner</i>	PSPC, contracting for services required for this program and related projects.
<i>PMSS Team</i>	The Contractor's resources who are providing the project management support services.
<i>PM Team</i>	The combined PSPC Project Management and PMSS Team are responsible for the project management for this program and related projects.
<i>Project Authority</i>	The Owner's representative responsible for the management of the contract for services for this program, and responsible for all matters concerning the technical content of the Work under the Contract. The Project Authority will assign members of his/her project management staff to administer the various projects under the program.
<i>Project Team</i>	The combined private sector and public sector team responsible for delivering the project including the PM Team, A&E Team, representatives from PSPC, the Senate, Library and other government organizations.

*PSPC's Departmental
Representative*

The owner representative responsible for the management of the contract for services for this program. The Departmental Representative will assign project managers to administer the various program projects.

PR 2 PROGRAM INTRODUCTION AND BACKGROUND

2.1 Introduction

PSPC requires Real Property Project Management support services to be provided by a highly experienced project leadership, management and administration service provider. The Contractor must assist PSPC to manage the planning, design and implementation for the Science and Parliamentary Infrastructure Branch Senate Accommodation Program.

The Contractor must deliver services in support of the responsibilities of the PSPC Project Managers and Director. Together they will function to provide integrated project management (PM Team) for the programs. The Contractor must coordinate all services with the program A&E Teams and consultants.

The Contractor must provide a full range of administrative, managerial, professional project management, project leadership and technical expertise required to deliver this program of work.

The level of effort for service requirements may vary in accordance with the needs of PSPC as the program progresses.

2.2 Background – Senate Accommodation Program

The Long Term Vision & Plan (LTVP) for the Parliamentary Precinct provides the long-term approach for rehabilitating the Precinct's heritage buildings, meeting Parliamentary accommodation requirements, and providing a secure and welcoming environment for parliamentarians, staff and visitors.

Projects within this program respect the following LTVP criteria:

- They contribute to the implementation of the LTVP strategy;
- They increase the asset's lifecycle investment sustainability; and
- They are necessary to support parliamentary operations and custodial responsibility for health & safety, security, asset integrity and heritage character.

2.2.1 The LTVP sets out the accommodations strategy for each of the Parliamentary Partners. The Senate Accommodations Program is the component of the LTVP specific to the Senate of Canada. The Senate Accommodations Program includes several Parliamentary Buildings and Assets, including Centre Block, East Block, Senate of Canada Building, Victoria Building and others. The objective of this Project Management Support Service contract is to provide services to support Planning and Implementation for the East Block Rehabilitation, Senate of Canada Building Modernization, and other possible ancillary projects.

2.2.2 The average yearly budget for the Senate Accommodation Program with multiple projects running at the same time at various stages of development ranging from \$5M to \$40M

2.3 Constraints and Challenges

It will be incumbent on the entire PM Team to actively manage each program project to identify, mitigate or eliminate project constraints and challenges.

Current project constraints and challenges are noted below. Others exist, or will exist over the life of each project, or the overall program.

- Implementation of these projects in occupied Parliamentary Buildings requires a significant amount of planning. Detailed and tailor made implementation plans for each project is required. Plans must include all operational and administrative constraints (security, shut-down notices, noise reduction, etc...), temporary services, etc.
- Fully coordinated and continuous follow-up for implementation compliance on the project site cannot be understated. The Project Team must take a leading and proactive role in this matter throughout the entire design and implementation periods.
- As part of the overall LTVP, planning for major rehabilitation of the Parliamentary Buildings is underway. The Senate Accommodation Program and their related projects must integrate various parts of the major rehabilitation program so that work completed is permanent in nature and well-coordinated.
- Managing expectations of many stakeholders.
- Various projects are occurring at the same time in the same area. Close coordination with other projects is crucial.

PR 3 PROGRAM OBJECTIVES

The following objectives are to be met throughout the implementation of The Senate Accommodation Program:

- To implement a tender approach in each project to ensure timely execution of the construction. While seemingly basic in nature, continuous attention to detail in both planning and implementation is of the utmost importance. This approach will allow for viable and realistic project delivery;
- To provide a cohesive functional partnership and open communication between all members of the Project Team and stakeholders throughout all phases of each project's life;
- To support and critique an integrated and focused A&E Team with an in-depth understanding and collective 'buy-in' for each project's requirements, scope, construction cost limit and scheduling objectives, working constructively to ensure a collaborative and cooperative team approach.

Delivery of each project must respect the approved scope, quality, cost, and schedule. Requirements include but are not limited to:

- Professional conduct in all phases of the project, employing best practices for cost, schedule, quality, scope management and control;
- Rigorous scheduling, planning, and control at all phases of each project and the overall program with specific intent to mitigate claims;
- Strong and disciplined change control system;
- An accelerated delivery of services to meet the scheduling constraints and a commitment by the A&E Team to develop an integrated design solution compatible with the heritage character of the building;
- Quality assurance reviews during the design and construction phases and commissioning of facilities;
- Project will be subject to Value Engineering as early as during concept stage, led by the PMSS Team;
- Continuous risk identification and management program employing effective methodologies and responses to ensure effective project and program delivery; and
- Continuous and comprehensive documentation of each project and the program at all stages of implementation.

PR 4 HERITAGE CHARACTER

Most buildings and the grounds of SPIB are designated “Classified” or “Designated” due to their architectural quality and important historical associations.

Heritage Conservation Guidelines will provide the Project Teams and stakeholders with principles and policies related to the historic preservation. Federal Heritage Buildings Review Office (FHBRO) will review and approve all heritage interventions.

PR 5 APPLICABLE DOCUMENTATION

There are numerous reports and reference materials for the Senate Accommodation Program that will be made available to the PMSS Team, who must review and understand them. Other detailed documents that will also be made available to the PMSS Team include:

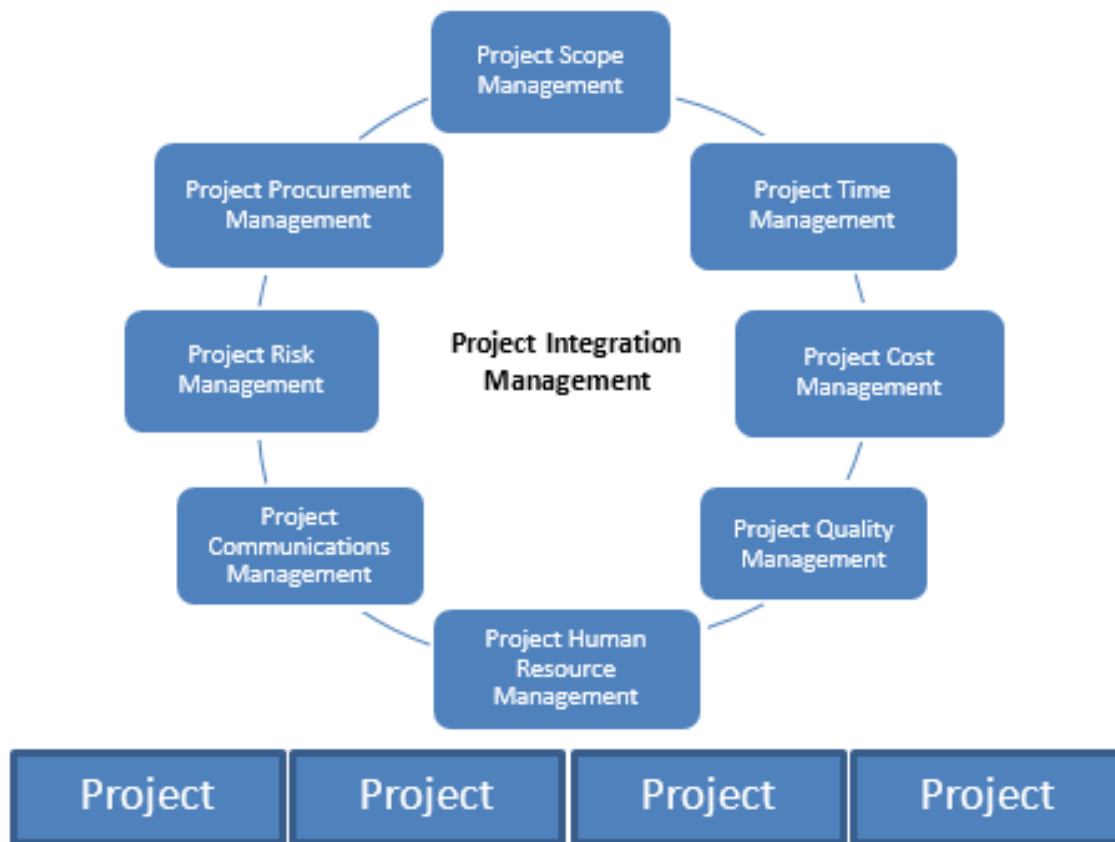
- Existing project documents
- LTVP (<https://www.tpsgc-pwgsc.gc.ca/citeparlementaire-parliamentaryprecinct/documents/vplt-ltvp-2017-18-eng.pdf>)

The following website is also available for online research:

- General Information about the Parliamentary Precinct;
<https://www.tpsgc-pwgsc.gc.ca/citeparlementaire-parliamentaryprecinct/index-eng.html>

PR 6 PROJECT MANAGEMENT SUPPORT SERVICES TEAM

The following figure illustrates the overall scope of PMSS project management technical resources that will be required for the Senate Accommodation Program and its sub-projects.



The PMSS Team will form part of an integrated Senate Accommodation Program Project Management Office (PMO) and work closely with the PSPC project management resources.

The PMSS Team shall be comprised of qualified managerial, professional and technical expertise with extensive relevant experience.

The Contractor must assign the Senior Project Leader (SPL) as the PMSS Team leader throughout the term of the contract. The PMSS Team must have the expertise, experience, and leadership necessary to provide all of the services and administration as identified in this document, including but not limited to:

- Comprehensive project leadership, management and project administration services;
- Heritage conservation project leadership and management;
- Financial analysis;
- Cost planning and control;
- Schedule planning and control;
- Quality assurance management;
- Risk management;
- Contract management;
- Design & Construction Management;
- Construction events logistics co-ordination to forecast and manage work disruptions with the parliamentary operating environment and other projects;
- Change order management and control, including unique SPIB approval process;

- Comprehensive project monitoring and reporting;
- Communications and technical writing support for written reports and “deck” presentations;
- Documents and records management;
- Security requirements management;
- Minutes of Meetings;
- Document management and collaboration tools;
- Documentation organization, management and control both in house and on behalf of the entire PSPC team and offices; and
- Claim management.

All Contractor resources who form part of the PMSS Team must report to the SPL. The SPL will be the main point of contact with the PSPC Departmental Representative and must coordinate all services provided by the PMSS Team. The Contractor must ensure the required expertise of the PMSS Team is maintained for the duration of the Contract.

PROJECT ADMINISTRATION (PA)

PA 1 GENERAL REQUIREMENTS

The following administrative requirements apply during all phases of program delivery and throughout the duration of the contract.

1.1 PSPC Program and Project Management

The PSPC Program Director (Departmental Representative) and Project Managers administer the overall program and related projects and exercises continuing control over the program and projects during all phases of development and are responsible for the program and the project progress on behalf of PSPC.

1.2 Correspondence Protocol

The SPL must work closely with the PSPC Departmental Representative. Unless otherwise directed by the PSPC Departmental Representative, the Contractor, including the PMSS Team must conduct project communication through the PSPC Departmental Representative. If conflicting information is provided, or information that deviates from the objectives set out in this mandate, then the Contractor must seek clarification from the Departmental Representative

A Document Management Control System must be used to save, share, and access project documents. A project filing system must be followed and maintained for all projects.

1.3 Media

The Contractor, including the PMSS team, must not respond to requests for project related information or questions from the media. All media inquiries must be directed to the PSPC Departmental Representative without response to those requesting the information.

The SPL must ensure that no staff of the PMSS Team (including any Subcontractors, Suppliers or associates) grants interviews with the media.

1.4 Security Related to Program and Project Information

The Contractor and any person contracted or employed by the Contractor must not discuss issues relating to the Senate Accommodation Program or their related projects, the LTVP or any of its projects or any of the various sub-projects specifically including, but not limited to building layout, design, security provisions, except as they relate to the direct provision of PMSS services.

1.5 Anticipated Level of Effort

The extent of service requirements will vary in accordance with the needs of PSPC as the various sub-projects forming part of the Senate Accommodation Program are implemented.

During the implementation of the Senate Accommodation Program, it is anticipated that there may be times where an increased and/or decreased level of effort is required as a result of project approvals, reviews and/or other extenuating circumstances. This may result in a change to the overall required level of effort for the PMSS Team.

1.6 Scheduling Work

In order to provide the Contractor with an outlook of the projected scope and level of effort for the service requirements, the PSPC Departmental Representative will meet with the SPL on a monthly basis to identify and review the overall project status and upcoming monthly activities and service requirements.

The purpose of these regular meetings will be to:

- Provide the SPL with sufficient information to forecast and plan PMSS Team resourcing commitments for the next 90 day period;
- Identify and confirm tasks and a proposed work plan; and
- Confirm anticipated deliverables for the next 30, 60 and 90 day periods.

1.7 Project Deliverables

Where deliverables and submissions include summaries, reports, drawings or schedules, unless otherwise specified by the PSPC Departmental Representative the Contractor must provide two (2) hard copies of all reports as well as one (1) electronic copy in native format and one (1) copy in *.PDF format on a readable CD, with each submission. Summaries and reports will vary in size from letter to tabloid format, to suit the type and content of the information being presented. Amended or supplemental documentation such as briefing notes and presentations will be required from time to time. The cost of producing the above-mentioned copies will be by PSPC, though an existing printing services standing offer. All deliverables must be prepared in English.

Deliverable	Required Format
Written reports and studies:	MS Word
Spreadsheets and budgets:	MS Excel
Presentations:	MS PowerPoint and Visio
Schedules:	Primavera and/or Microsoft Project
Web:	Adobe PDF
Internet:	HTML

1.7.1 PMSS Monthly Reports

At the start of the contract, the Contractor must submit a sample of the monthly report structure for review and approval by PSPC. PMSS Monthly Reports must adhere to the following requirements and characteristics:

- Include an executive summary of key points, suitable to be utilized as a project briefing document for PSPC and, as applicable, Senate or Library senior management;
- Consolidate information generated by the scope and activities relative to the NPMS stage and will be utilized as the benchmark project control document to monitor progress of the project. It will require supplements and modifications to reflect changes in program and related project parameters as may be identified and approved throughout the project life cycle;
- Incorporate relevant project delivery issues from the A&E Team, General Contractor, and Client/User's outlining progress to date, financial and schedule reviews as well as identification of any contractual issues;
- Issue on the same date each month and within one week after the established date of issue of reports from the A&E Team;
- Include a one-month and three month 'look ahead' forecast of the PMSS human resource requirements for the project for review and approval by the PSPC Departmental Representative; and

- Revise the PMSS Monthly Report as required by the PSPC Departmental Representative and resubmit for acceptance.

The structure of the PMSS Monthly Report will be used for all projects. The content of the reports will vary according to the project phase and the corresponding scope and activities.

1.7.2 Schedule Monthly Report

The Contractor must submit narrative reports on project performance with respect to schedule on a monthly basis that must include:

- Review of progress and status of critical activities;
- Specification of current and anticipated problem areas, potential delays and corrective measures;
- Updated project schedules;

1.8 Acceptance of PMSS Deliverables PSPC reserves the right to reject work.

1.9 Response Time

The Contractor and the PMSS Team must be available to attend meetings in Ottawa within one (1) day of notice and respond to inquiries within a half (1/2) day.

1.10 Program and Project Meetings

Meetings are required with various formal committees. The PMSS Team must attend formal committee meetings as required throughout the entire duration of this contract.

Types of Meetings

- Meetings with PSPC Team;
- Meetings with PSPC Senior Management;
- Project design meetings;
- Project construction meetings;
- Project schedule meetings;
- Client/User meetings (i.e. Senate and Library groups and Consultant Teams);
- Project Plans and Presentations to Executives (may be required to assist with presentations);
- Project status and update meetings; and
- Project approval presentations to investment boards.

The Project Authority will chair the PM Team meetings to coordinate and direct the activities of the project PM Team. This is the umbrella meeting at which all PM Team decisions and directions will be communicated and recorded. The PMSS team must prepare and issue minutes within 48 hours of these meetings. The purpose of PM Team meetings is to:

- Monitor the progress against overall objectives;
- Monitor the progress against the approved program and related projects scope, cost and schedule;
- Ensure overall coordination with Client / User requirements;
- Ensure communication between all participants and to deal with special problem issues;
- Ensure effective quality assurance and coordination with Client / User and PSPC reviews; and
- Ensure coordination of all Project Team activities.

The PMSS project managers must attend individual project meetings on a regular basis, meeting the needs and requirements of each project. The A&E Team is to prepare and issue minutes within 48 hours of these meetings.

1.11 Risk Management Sessions

The SPL must arrange Risk Management sessions quarterly throughout the life of each program project. Key members of each project team will attend sessions. The timing of these sessions is to be such that session reporting can be used for input to the SPIB quarterly report. The purpose of these sessions will be to review risk factors and implement mitigation plans in order to manage risk throughout the life-cycle of each project and overall impact on the Senate Accommodation Program. The sessions must follow generally accepted practices as follows:

- A review by all participants to identify potential areas of risk;
- An assessment of each risk in terms of likelihood of occurrence;
- An assessment of each risk in terms of potential impact;
- The development of a risk management strategy following PSPC risk management best practices to mitigate the identified risk impacts with particular focus on risks that are determined to be medium to high in terms of likelihood of occurrence and medium to high in terms of impact; and
- The development and maintenance of a risk register.

The PMSS Project Managers (PM) must develop, maintain and actively manage a Risk Management Plan per project as part of the Required Services. The SPL will roll these risk plans into a summary risk assessment for the overall Senate Accommodation Program.

PSPC will pay for a third party as facilitator for these sessions if deemed necessary by PSPC, in consultation with the SPL.

1.12 Work Location

The PMSS team will perform the work from various PSPC SPIB office buildings most of which are located on Sparks Street. PSPC will provide and maintain basic office furniture, all computers, software, printers, and data lines used to service the PMSS Team. PSPC will not provide cellular phones or BlackBerry. PSPC will not charge the Contractor rent for the work space.

1.13 Construction Activity and Review

The PMSS Team must take an active role in reviewing on site construction activities for the purpose of assessing, verifying and reporting on the value of work completed. The Contractor must ensure that the PMSS Team abides by all health and safety requirements as defined by the construction authority, including, but not limited to, the provision and maintenance of personal protective equipment and required safety training.

1.14 Change Management

The Contracting Authority, PSPC's Real Property Contracting Directorate (RPCD), must authorize Amendments/change orders to consultant/construction contracts. The PMSS Team must prepare proposed contract amendment 'short form' for endorsement by SPIB PM and/or Project Director and then submit to RPCD for approval prior to the issuance of all amendments and change orders. Short forms must detail the scope or nature of the change along with relevant contracting information such as; why this change is necessary; upset limit of the cost of the contemplated change, cost of contract changes to date and related information.

Authorization to a consultant or contractor to proceed with contemplated work cannot be given until the related short form is approved. Once authorization has been granted by RPCD and provided the negotiated value of the proposed work is less than the amount pre-authorized, then written authorization by PSPC to proceed with the work can be given to the consultant or contractor.

A fully documented amendment or change order is then submitted to RPCD for their review and written approval. The approved amendment or change order then formally becomes part of the contract and contract file. The submitted amendment or change order is to include the approved short form that indicates the scope/statement of work or services, complete with:

- A final and detailed quotation from the consultant or contractor on which the PSPC Project Manager has provided his or her written recommendation that the scope and price is fair, reasonable and technically compliant;
- In the case of construction contracts, approval from the A&E Team that he/she and his/her consultant team is in agreement with the scope and contractor's quoted price; and
- All related correspondence.

The change management process applies to all contracts let by RPCD. The change management process occurs throughout all stages of the NPMS and must be rigorously applied by the PMSS PM so that each change stands the test of audit.

In addition to the above, the Science and Parliamentary Infrastructure Branch has its own quality control and contracting approval process. This process requires SPIB management validation that proposed contract changes are appropriate.

All contract changes must be recorded on a contract log that must be maintained for each project.

PA 2 THE PROJECT TEAM

2.1 Project Team Organization

This program and related projects are to be managed and implemented in a collaborative manner. All team members are responsible for establishing and maintaining a professional and cordial relationship. The Project Team refers to the key representatives, involved in coordinating and delivering the program and related projects.

2.2 Roles and Responsibilities of the Project Team

2.2.1 Program Director

The Program Director is accountable for the expenditure of public funds and the delivery of the program and related projects in accordance with terms accepted by the Treasury Board. The Program Director reports to senior PSPC executive management and is the formal point of contact with the Client / Users.

2.2.2 Client / User Representatives (Parliamentary Partners)

The Senate of Canada and Library of Parliament also referred to in this document, as the Client / Users, will have input to all projects as the implementation of each will have a direct effect on parliamentary operations.

2.2.3 PSPC Senior Communications Advisor

The Senior Communications Advisor is the PSPC representative responsible for all communications requirements and activities including contact with the media and the public.

2.2.4 PSPC Project Manager

The Project Manager is the departmental representative for specific program projects. The Project Manager is accountable for management of the project implementation.

2.2.5 Project Management Support Services Team

The PMSS Team must work with and provide full coordination of services with that of the Client / Users, A&E Team, the contractors, Authorities Having Jurisdiction and others in accordance with the required services identified in this document.

2.2.6 A&E Teams

A&E Teams report to the PSPC Project Team for specific projects and are responsible for the following:

- Analysis of Project requirements;
- Functional Programming, as applicable;

- Scheduling the Work through to the completion of the construction documents;
- Costing the work through to the completion of construction documents including the preparation of the Class D, Class C, Class B, and Class A pre-tender estimates;
- Preparing minutes for project delivery meetings;
- Preparing schematic design alternatives and recommendations;
- Providing design development services for the accepted schematic design;
- Preparing construction drawings and specifications for each tender package;
- Providing contract administration services related to the preparation and estimation of changes, certification of progress billings and recommendation of acceptance of the work;
- Providing general inspection services for quality control and responding to site conditions/issues;
- Defining commissioning procedures and confirming that performance requirements have been met; verifying that operating manuals and record drawings are provided and are accurate; and
- Providing warranty period services.

2.2.7 General Contractors

The General Contractor (GC) and, if contracted, a Construction Manager (CM) reports to the assigned PSPC Project Manager and will provide construction services.

The GC or CM will be the “Constructor” as defined in the Ontario Occupational Health and Safety Act, and will be responsible for health and safety requirements as described in the Canada Labour Code Part II on the construction site.

2.2.8 PSPC Property Manager

The Property Manager is the building operator and manager. The Property Manager is present on the Project Team to ensure facility management requirements are identified and incorporated into the project.

2.2.9 PSPC Technical Resources

PSPC Technical Resources provide expert advice and quality assurance for key architectural, engineering and interior design professional disciplines including design reviews to ensure technical requirements are suitably defined and incorporated through all phases of research, planning, design and implementation. A PSPC Design Manager will coordinate PSPC Technical Resources.

2.2.10 Heritage Conservation Services (HCS)

HCS is part of the PSPC Technical Resources sector reporting to the PSPC Project Manager through a Design Manager. HCS provides expert advice and quality assurance including design reviews to ensure that the heritage character of the building is protected through all phases of research, planning, design and implementation of the project. HCS also provides advisory liaison with the Federal Heritage Building Review Office (FHBRO).

2.2.11 PSPC Commissioning Manager

The PSPC Commissioning Manager represents the Property Manager and Project Manager’s interests and maintains overall responsibility for representing PSPC in the Commissioning Process. The PSPC Commissioning Manager is responsible for overseeing all commissioning activities that are prepared by the A&E Team and implemented by contractors, including post construction stages of each project, assuring that all project issues are addressed.

Throughout the Commissioning Process, the PMSS Team, the A&E Team and the representatives on-site will work closely with the PSPC Commissioning Manager.

Reporting to the PSPC Project Manager, the PSPC Commissioning Manager will review and approve all documentation at all stages of the project delivery and will monitor all commissioning activities, including the accuracy of reported results.

PA 3 SUBMISSIONS, REVIEWS AND APPROVALS PROCESS

3.1 Authorities Having Jurisdiction

The following are authorities having Federal Government jurisdiction over the project:

Authority	Federal government Jurisdiction
Treasury Board of Canada	Project and contract approvals
Public Services and Procurement Canada	Contracting authority, project delivery, Fire prevention engineering services, and Life safety
The Senate or Library (Principal User)	Functional design requirements and standards, Multimedia, IT, Security systems
Environment Canada	Canadian Environmental Assessment Act and Canadian Environmental Protection Act
National Building Code	Building codes and standards

The Federal Government does defer to provincial and municipal authorities for specific regulations, standards and inspections. In areas of conflict, the Federal authority prevails.

Authority	Jurisdiction
Ontario Ministry of Labor	Employment Standards, Construction Safety, Designated Substance Management, Workers Compensation
Ontario Ministry of the Environment	Environmental Protection Act: 3R Regulations, Building Discharges into the air, water and ground, Disposal of Designated Substances, including Asbestos
Ontario Ministry of Consumer and Commercial Relations – TSSA	Construction Hoists, Elevators, Escalators and Dumb, Waiters, Pressure vessels
City of Ottawa	Building and Plumbing Permits and Inspection, Fire Safety, Equipment and access for fire-fighting equipment
Ontario Electrical Safety Authority	Electrical Permits and Inspection

National Capital Commission (NCC)	Responsible for planning, as well as taking part in the development, conservation and improvement of Canada's Capital Region
FHBRO	Role is to advise custodian departments on how to meet their heritage obligations under the Treasury Board Policy on Management of Real Property

The A&E Team per project will submit drawings to the municipality for review during both design and the preparation of construction documentation. The PMSS Team must coordinate with the A&E Team to complete negotiations and resolve all permit related issues prior to tender. Municipal authorities will inspect the construction site.

3.2 Health and Life Safety

Public Services and Procurement Canada (PSPC) recognizes the responsibility to ensure the health and safety of all persons on Crown construction projects and the entitlement of both federal employees and private sector workers to the full protection afforded them by occupational health and safety regulations.

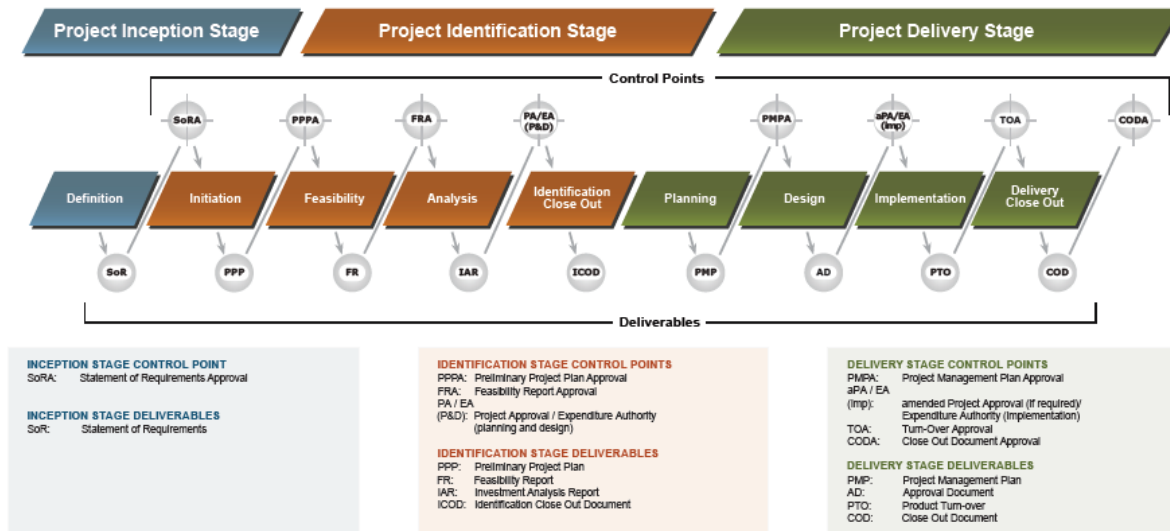
In keeping with the responsibility and in order to enhance health and safety protection for all individuals on federal construction sites, PSPC will voluntarily comply with the applicable provincial / territorial construction health and safety acts and regulations in addition to the related Canada Occupational Safety and Health Regulations.

PA 4 PSPC NATIONAL PROJECT MANAGEMENT SYSTEM (NPMS) MODEL

PSPC has adopted the National Project Management System (NPMS) model which is a key component of the PSPC project management system and provides distinct control points that are linked to the PSPC's project approval processes, as well as, identifies deliverables at each phase, activity, and task. This model must be adhered to for all projects.

The following figure is the NPMS model which is also available online at the following website:
<https://www.tpsgc-pwgsc.gc.ca/biens-property/sngp-npms/documents/iasndgdp-ittnpms-eng.pdf>

National Project Management System (NPMS)



The National Project Management System (NPMS) consists of 3 Stages and 9 Phases.

The Project Inception Stage: Provides a forum for vetting real property proposals to ensure that proposed projects are in keeping with PSPC portfolio strategies and respond in the most effective manner possible.

The Project Identification Stage: Initiates a project and brings it to a level of development equivalent to a Preliminary Project Approval (PPA) submission. This stage is composed of four distinct phases to allow for proper planning and development of project objectives for PPA:

- Initiation Phase;
- Feasibility Phase;
- Analysis Phase; and
- Identification Close-out Phase.

The Project Delivery Stage: continues the development of the project objectives through the required approval process and provides for the full implementation of the project. This stage is composed of:

- Planning Phase (as per Section RS2 herein);
- Design Phase (as per Section RS3 herein);
- Implementation Phase (as per Section RS4 herein); and
- Close-out Phase (as per Section RS5 herein).

REQUIRED SERVICES (RS)

These Required Services (RS) apply to the entire Science and Parliamentary Infrastructure Branch Senate Accommodation Program, including related projects. Services must be provided in accordance with the requirements identified in the National Project Management System (NPMS).

RS 1 GENERAL SERVICES

1.1 Scope and Activities

The Contractor must provide project management support services, in accordance with the best practices of PMI and the National Project Management System, to the PSPC's Program Director, Departmental Representative and Project Managers including; manage project activities, review project scope, resolve issues, coordinate design and project support activities, control costs and schedules, develop and maintain documentation systems, administer contracts, manage design and construction, manage the transition for building occupancies, and the project final completion.

The Contractor must support their PMSS team and be available to address concerns identified by PSPC.

1.1.1 Optional Services

The optional resource categories for this project are indicated in Table 1 in section 1.2, below. The optional services shall be limited to the tasks referred to in section RS 1 General Services 1.2.7 to 1.2.12. The Contracting Authority, through a written amendment will identify the resource category(ies), quantity(ies) and level(s) of effort for any additional work required.

1.2 Typical Required Services (RS) Support Activities and Optional Resources

The following table outlines the resource categories, levels and estimated number of PMSS personnel required and optional, throughout the duration of the contract. A description of the tasks for the required and optional resources are listed below.

Table 1

Resource Category and Level	Estimated Number of Required Resources	Estimated Number of Optional Resources	Total
Project Leader for Real Property – Senior	1	0	1
Project Manager for Real Property – Senior	2	0	2
Project Manager for Real Property – Construction Senior	1	0	1
Project Manager for Real Property - Intermediate	1	0	1
Project Administrator for Real Property - Intermediate	2	0	2
Financial/Cost Specialist for Real Property - Intermediate	1	0	1
Project Planner for Real Property - Intermediate	0	1	1
Quality Assurance/Management Specialist - Senior	0	1	1
Risk Management Specialist – Senior	0	1	1
Technical Writer – Intermediate	0	1	1
Claims Analyst - Senior	0	1	1
TOTAL	8	5	13

1.2.1 Tasks and responsibilities - Project Leader/Executive - Senior

The Senior Project Leader (SPL) must provide overall leadership and direction to the PMSS Team. The SPL must work closely with the Departmental Representative, PSPC Project Managers and the PMSS Project Managers, forming a core PM team.

The SPL must provide the direction, support and assess the performance of the PMSS Team members.

During the various NPMS stages of the assigned projects, the SPL must participate in project development, project identification, project delivery, technical project management and technical administration support by working with project managers, consultants and clients to provide integrated project management services. The required services may include, but are not limited to the following:

- Assessing the organization's capacity/capability to undertake and successfully deliver a project in the context of the overall program or portfolio program or portfolio priorities through strategic planning;
- Advising Senior Management on a range of issues affecting the organization's ability to achieve the project's business objectives;
- Assisting in the prioritization and assignment of projects within the program/portfolio;
- Managing several Senior Project Managers, each responsible for an element of the project/program/portfolio and its associated team (e.g. project and financial management);
- Meeting with organizational executives to ensure all organizational (internal and external) stakeholders are committed to moving forward on the project (e.g. opportunity evaluation);
- Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified project, program or portfolio elements to solve these problems, and obtaining approval thereof;
- Managing the implementation of a project/program/portfolio to identify, analyze, plan, track and control progress on a continuous basis;
- Making recommendations and providing advice for improvements and assisting in developing solutions and implementing recommendations (e.g. policy development and standards development);
- Preparing and presenting findings, status and other relevant matters;
- Overseeing the development of a Project Business Case (e.g. business planning and program review);
- Managing Program changes in accordance with the change management process; and
- Motivating the team to ensure commitment to the program's objectives.
- Specifying the general requirements of the project;
- Developing project alternatives and identifying their administrative, economic, and technical feasibility and practicality; and associated policy and organizational change requirements;
- Planning, directing, and controlling the activities of a project team within scheduled time and cost parameters;
- Producing overall project plans and obtaining approval of preliminary analysis; and
- Updating and providing briefings to upper management on progress and concerns of the project/program of work.

Further services include but not limited to:

- Providing strategic analysis and expert advice for integrated management services;
- Providing strategic advice for major renovation to heritage and national historic properties, including delivery options and procurement approaches;
- Providing advice and leadership in the development and assessment of potential options on project development and implementation strategies that should be explored, including the methods and mandate for proceeding;
- Developing the options analysis providing necessary data and descriptions, cost benefit and risk analysis for each identified option and a supportable recommendation of the most appropriate selection;
- Formulating and preparing Investment Analysis Reports and other project approval documents, identifying and defining the detail the optimum solution, establishing a project budget, completion date and required controls;
- Formulating, organizing, and delivering convincing and concise messages

- Developing and preparing the project definition and obtaining sign-off by the Science and Parliamentary Infrastructure Branch, which has established conditions for the planning and implementation of projects;
- Preparing and monitoring of Memorandum of Agreements, Memorandum of Understanding and transfer of furniture and equipment agreements, as required;
- Recommending the resource levels and competencies required to deliver the Senate Accommodation Program and projects; developing work plans, schedules and budgets, monitoring progression of the work and initiating measures to respond to changing circumstances and ensuring achievement of scope, cost, time and quality requirements.
- Reviewing and accepting (or requesting changes to) the overall planning, design development and implementation process, including feasibility, environmental and other studies, conceptual designs; the associated class of cost estimate; project scheduling; project changes; issues management; approval requirements; and reporting for each project within the Senate Accommodation Program;
- Obtaining, analyzing and synthesizing information from various parties involved in the delivery of projects and developing reports and briefing materials, including identification of issues together with recommendations to address identified issues;
- Providing leadership of the multidisciplinary specialist and consultant resources required to deliver the Senate Accommodation Program and projects;
- Planning, discussing and directing PMSS Team priorities;
- Reviewing the co-ordination of work on individual projects within the Senate Accommodation Program;
- Program, taking advantage of potential efficiencies;
- Assessing alternatives and establishing project goals, priorities, performance indicators and milestones;
- Chairing meetings with clients, team members and other managers, consultants and other stakeholders to review and analyze the delivery of project needs;
- Reviewing and contributing to the development of cost estimates, cost benefit and risk management analyses and contingency plans and proposes alternative approaches to optimize costs and minimize risk in the delivery of the Senate Accommodation Program and projects ;
- Reviewing the development of project forecasts and budgets. Managing and monitoring the Senate Accommodation Program and projects budgets and adjusting to meet changing requirements, minimizing risk and optimizing resource utilization; and
- Conducting the commissioning stage of the project, verifying that the project complies with the criteria in the Investment Analysis Report and Project Brief.

1.2.2 Tasks and responsibilities - Project Manager for Real Property – Senior

A Project Manager is not only defined by years of experience. More importantly, a Project Manager is a person who has the expertise, knowledge, tact and judgment necessary to lead a team through the many challenges in project delivery, finding balanced and effective solutions to those challenges.

During the various NPMS stages of the assigned projects, the PMSS Project Managers will participate in project development, project identification, project delivery, technical project management and technical administration support by working with project managers, consultants and clients to provide integrated project management services. The required services may include, but are not limited to the following:

- Developing project scope, requirement documents, statement of work, participating in client discussions, analysis of functional and operational requirements of the client;
- Preparation of project approval documents (e.g. business cases, feasibility studies, Treasury Board submissions) required for funding or project approval;
- Planning and coordinating the activities of project personnel, contractors or other support providers, including the preparation of preliminary time schedules for project design and implementation; and

- Managing architectural/engineering and associated specialists teams, reviewing project costs and resolving variances with predetermined budgets by recommending action and resolving conflicts.
- Planning, directing and coordinating a project management office and its activities within time and cost parameters;
- Preparing formal work breakdown structure and compliance charts;
- Producing draft plans and sections for incorporation into Project Plans;
- Contributing to the organization's strategic and business planning initiatives (e.g., identifying strategic goals and implementing initiatives to achieve them (such as through policy development, standards development and program review));
- Recognizing and taking action on opportunities to combine professional resources through partnering arrangements (e.g., multi-disciplinary practices);
- Planning facilitation workshops that address strategic planning, teambuilding, positive-centered learning or conflict management, conducting stakeholder interviews. Preparing workshop material, facilitating the workshop, and on-going partnering process management;
- Preparing or managing of project documents, such as project charter or plan, client statement of work, investment analysis report, feasibility study, terms of reference, value engineering, lifecycle analysis, commissioning plan or lessons learned;
- Establishing and reviewing project and construction implementation strategies including, lump sum, phased, construction management, design-build and public-private partnerships;
- Coordinating consultants retained separately to ensure an integrated design (for example, geotechnical, seismic and environmental designs, functional program and fit-up/office planning);
- Briefing consultants and contractors on roles, responsibilities and guidelines for contract administration and on-site behavior;
- Developing an updated Project Plan, noting constraints, assumptions, inclusions and exclusions after review with stakeholders;
- Coordinating Value Engineering exercises or other strategies aimed at integrated design solutions and cost management; ensuring the review and implementation of outcomes from these processes;
- Maintaining the design change management process that records changes to the scope of work;
- Monitoring the design, implementation and operations of the project against established goals;
- Reporting progress of the project on an ongoing basis;
- Assisting in the preparation of recommendations to engage or commission consultants, preparing consultant Request for Proposal (RFP) documents and reviewing and evaluating consultant proposals;
- Reviewing monthly progress claims from consultants for compliance with consultant agreements and recommending payments;
- Analyzing project schedules including contractor or consultant deliverables and determining whether corrective action is required to meet deadlines;
- Attending construction site meetings, providing input on interpretation of contract plans and specifications while ensuring that consultants or contractors fulfill their responsibilities under their respective agreements;
- Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems;
- Managing and planning moves, including furniture coordination, cabling and signage procurement and verification;
- Coordinating and preparing documentation in response to scheduled and unscheduled reports, returns and observations to update management on project progress;
- At substantial completion, participating in inspections or acceptance boards: inspecting the work, evaluating amounts withheld due to deficiencies, accepting the work on behalf of client, recommending issuance of the interim certificate and payment to the contractor;
- Incorporating final reports into the Project Plan, including details of outstanding issues, warranties and obligations of consultants or contractors, posting project reviews and lessons learned;
- Ensuring that deficiencies and incomplete work are identified, managed, corrected and accepted as complete promptly; recommending issuance of final completion certificate; and

- Developing and maintaining various systems for the management and control of the project in a manner compatible with client standards and guidelines. This includes financial, approval tracking, change management, communications, and security protocol for project staff and records management system.

Further services include but not limited to:

- Developing and maintaining project Work Breakdown Structure;
- Preparing required NPMS documents, including but not limited to feasibility study, Project Management Plan, IAR, etc.
- Assisting the project manager or consultant design team in interpreting the project brief and in understanding department and other government department standards and policies
- Establishing a team of professional and technical PM resources required to review design submissions while also ensuring a comprehensive reply at each step;
- Managing A&E Teams and other consultants;
- Monitoring A&E Teams and other consultants' deliverables and performance;
- Maintaining design and construction deliverable logs;
- Working with other project managers, consultants and clients to plan, schedule and execute the timely delivery of the Senate Accommodation Program and related projects in accordance with approved deadlines and milestones;
- Developing and reviewing detailed project cost estimate in accordance with predetermined budgets/funding;
- Developing and maintaining project cash flow;
- Providing cost (planning, estimating, and control) advisory and quality assurance services;
- Preparing option analyses and "what if" scenarios;
- Reviewing and challenging the estimates prepared by other consultants;
- Providing elemental cost analysis, risk analysis, life cycle costing, value engineering/management techniques and earned value management;
- Preparing on a monthly basis, project progress reports on project status, project schedules, project expenditures and impending actions to be undertaken;
- Providing assistance to ensure that specialist consultants are engaged such as geotechnical, environmental, acoustical, office planning etc. to provide information required to complete and proper design;
- Obtaining client approval for functional programming reports, consultant terms of reference, design packages, etc.;
- Reviewing consultant fee progress claims for compliance with the consultant agreements, recommending for payment at each step of the design process;
- Establishing or reviewing construction implementation strategies using either lump sum general contract, phased construction, construction management or combinations thereof;
- Determining requirements for pre-tendering or post-tendering of specialty items such as mechanical or electrical equipment, planning the scope of work for trade packages on phased implementation projects, including allowances for general conditions;
- Developing and maintaining project schedule;
- Developing and maintaining the project quality management plan;
- Conducting contractibility and constructability reviews of tender document submissions and addenda;
- Monitoring tender periods to ensure all bidder inquiries are tracked, reviewed and responded to so as to ensure there is a competitive bid process;
- Conducting job site briefings for interested Bidders;
- Assisting with the technical and administrative review of bids proposals and tenders received and providing recommendation for contract award;
- Inspecting work in progress and ensuring compliance with contract documents;

- Filing project documents in accordance with the NPMS filing structure;
- Reviewing contractor detailed breakdowns of tendered amounts to ensure all items of work included are properly identified for progress billing purposes;
- Evaluating contractor or consultant progress for value of work done on site and recommending payment of contractor/consultant monthly progress clients;
- Analyzing contractor or consultant schedules, using scheduling software, Gantt charts, bar graphs or critical path method etc. to determine whether corrective action is required to meet deadlines or milestones;
- Investigating changed conditions for requested design changes and recommending on the issuance of contemplated to change notices to the construction agreement;
- Estimating the cost of scope changes and negotiating in conjunction with the consultants fair and reasonable price for the work with the contractor followed by the preparation of change orders and recommendation to revise the contract amounts;
- Monitoring commissioning;
- Evaluating contractor claims for disputed items resulting from different site conditions or delays by the crown and recommending settlement strategies and amounts;
- Responding to Access to Information and Privacy (ATIP) requests; and
- Developing and maintaining lessons learned.

1.2.3 Tasks and responsibilities - Project Manager for Real Property – Construction Senior

A Project Manager for Construction is not only defined by years of experience. More importantly, a Project Manager for Construction is a person who has the expertise, knowledge, tact and judgment necessary to lead a team through the many challenges in project delivery, finding balanced and effective solutions to those challenges.

During the implementation NPMS stage of the assigned projects, the PMSS Construction Project Managers will participate in project delivery, technical project management and technical administration support by working with project managers, consultants and clients to provide integrated project management services. The required services may include, but are not limited to the following:

- Planning and coordinating the activities of project personnel, contractors or other support providers, including the preparation of time schedules for project implementation; and
- Managing architectural/engineering and associated specialists teams, reviewing project costs and resolving variances with predetermined budgets by recommending action and resolving conflicts.
- Planning, directing and coordinating a project management office and its activities within time and cost parameters;
- Preparing formal work breakdown structure and compliance charts;
- Recognizing and taking action on opportunities to combine professional resources through partnering arrangements (e.g., multi-disciplinary practices);
- Planning facilitation workshops that address strategic planning, teambuilding, positive-centered learning or conflict management, conducting stakeholder interviews. Preparing workshop material, facilitating the workshop, and on-going partnering process management;
- Preparing or managing of project documents, such as value engineering, lifecycle analysis, commissioning plan or lessons learned;
- Establishing and reviewing project and construction implementation strategies including, lump sum, phased, construction management, design-build and public-private partnerships;
- Coordinating consultants retained separately to ensure an integrated design (for example, geotechnical, seismic and environmental designs, functional program and fit-up/office planning);
- Briefing consultants and contractors on roles, responsibilities and guidelines for contract administration and on-site behavior;
- Developing an updated Project Plan, noting constraints, assumptions, inclusions and exclusions after review with stakeholders;

- Coordinating Value Engineering exercises or other strategies aimed at integrated design solutions and cost management; ensuring the review and implementation of outcomes from these processes;
- Maintaining the design change management process that records changes to the scope of work;
- Monitoring the design, implementation and operations of the project against established goals;
- Reporting progress of the project on an ongoing basis;
- Reviewing monthly progress claims from consultants for compliance with consultant agreements and recommending payments;
- Analyzing project schedules including contractor or consultant deliverables and determining whether corrective action is required to meet deadlines;
- Attending construction site meetings, providing input on interpretation of contract plans and specifications while ensuring that consultants or contractors fulfill their responsibilities under their respective agreements;
- Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems;
- Managing and planning moves, including furniture coordination, cabling and signage procurement and verification;
- Coordinating and preparing documentation in response to scheduled and unscheduled reports, returns and observations to update management on project progress;
- At substantial completion, participating in inspections or acceptance boards: inspecting the work, evaluating amounts withheld due to deficiencies, accepting the work on behalf of client, recommending issuance of the interim certificate and payment to the contractor;
- Incorporating final reports into the Project Plan, including details of outstanding issues, warranties and obligations of consultants or contractors, posting project reviews and lessons learned;
- Ensuring that deficiencies and incomplete work are identified, managed, corrected and accepted as complete promptly; recommending issuance of final completion certificate; and
- Developing and maintaining various systems for the management and control of the project in a manner compatible with client standards and guidelines. This includes financial, approval tracking, change management, communications, and security protocol for project staff and records management system.

Further services include but not limited to:

- Maintaining project Work Breakdown Structure;
- Managing A&E Teams and other consultants;
- Monitoring A&E Teams and other consultants' deliverables and performance;
- Maintaining design and construction deliverable logs;
- Working with other project managers, consultants and clients to plan, schedule and execute the timely delivery of the Senate Accommodation Program and related projects in accordance with approved deadlines and milestones;
- Developing and reviewing detailed project cost estimate in accordance with predetermined budgets/funding;
- Developing and maintaining project cash flow;
- Providing cost (planning, estimating, and control) advisory and quality assurance services;
- Preparing option analyses and "what if" scenarios;
- Reviewing and challenging the estimates prepared by other consultants;
- Providing elemental cost analysis, risk analysis, life cycle costing, value engineering/management techniques and earned value management;
- Preparing on a monthly basis, project progress reports on project status, project schedules, project expenditures and impending actions to be undertaken;
- Providing assistance to ensure that specialist consultants are engaged such as geotechnical, environmental, acoustical, office planning etc.... to provide information required to complete and proper design;

- Reviewing consultant fee progress claims for compliance with the consultant agreements, recommending for payment at each step of the design process;
- Establishing or reviewing construction implementation strategies using either lump sum general contract, phased construction, construction management or combinations thereof;
- Determining requirements for pre-tendering or post-tendering of specialty items such as mechanical or electrical equipment, planning the scope of work for trade packages on phased implementation projects, including allowances for general conditions;
- Developing and maintaining project schedule;
- Developing and maintaining the project quality management plan;
- Conducting contractibility and constructability reviews of tender document submissions and addenda;
- Monitoring tender periods to ensure all bidder inquiries are tracked, reviewed and responded to so as to ensure there is a competitive bid process;
- Conducting job site briefings for interested Bidders;
- Assisting with the technical and administrative review of bids proposals and tenders received and providing recommendation for contract award;
- Inspecting work in progress and ensuring compliance with contract documents;
- Filing project documents in accordance with the NPMS filing structure;
- Reviewing contractor detailed breakdowns of tendered amounts to ensure all items of work included are properly identified for progress billing purposes;
- Evaluating contractor or consultant progress for value of work done on site and recommending payment of contractor/consultant monthly progress clients;
- Analyzing contractor or consultant schedules, using scheduling software, Gantt charts, bar graphs or critical path method etc. to determine whether corrective action is required to meet deadlines or milestones;
- Investigating changed conditions for requested design changes and recommending on the issuance of contemplated to change notices to the construction agreement;
- Estimating the cost of scope changes and negotiating in conjunction with the consultants fair and reasonable price for the work with the contractor followed by the preparation of change orders and recommendation to revise the contract amounts;
- Monitoring commissioning;
- Evaluating contractor claims for disputed items resulting from different site conditions or delays by the crown and recommending settlement strategies and amounts;
- Responding to Access to Information and Privacy (ATIP) requests; and
- Developing and maintaining lessons learned.

1.2.4 Tasks and responsibilities - Project Manager for Real Property – Intermediate

The Intermediate Project Manager is to provide assistance to the Senior Project Manager in all of the Senior Project Manager's activities but to a lesser extent, where judgment and experience to be applied to project situations do not require the level of analysis and interpretation of a Senior Project Manager.

The required services may include, but are not limited to the tasks identified in section 1.2.2 Project Manager for Real Property – Senior.

1.2.5 Tasks and responsibilities - Project Administrator for Real Property – Intermediate

The required services may include, but are not limited to the following:

- Assisting project team in management activities including financial, planning and contracting aspects;
- Providing financial administrative support to suit requirements;
- Assisting with security clearance process;

- Establishing project administration procedures;
- Providing administrative and technical support of a clerical nature as required to a project team; Developing document and records management system and control process for project teams; Receiving incoming mail (both hard copy and e-mail), prioritizes and assesses urgency of mail and sets deadlines;
- Acting as the first point of contact in a "hot-line" situation by accepting incoming calls, logging calls, attempting to resolve simple problems and following established procedures for more difficult problems;
- Participating at project meetings, preparing/distributing minutes and records of decision;
- Providing comprehensive project planning and monitoring, reporting using project plan format;
- Maintaining and updating relevant project information in manual and/or electronic files; project information might include such things as project activity schedule, status reports, correspondence;
- Communicating with project management on administrative matters related to the project;
- Assisting with the review of project requirements with specialists, other jurisdictional authorities and stakeholders;
- Assisting in the preparation and coordination of documentation in response to scheduled and unscheduled reports to update management of project progress; Providing technical writing support for written reports and presentation decks;
- Assisting in managing request for information (RFI) procedures;
- Providing support to tendering and contracting processes as requested; Supporting start-up construction process (preparation & meeting) by assisting in managing construction logistics: forecast, coordinate work, avoid disruptions to occupants;
- Providing support in the preparation of timely and accurate Contemplated Change Notices (CCN's) and Change Orders (CO's) for approval, tracking and communications; and
- Supporting post-construction services and post-construction evaluations.

Further services include but not limited to:

- Developing and maintaining NPMS checklist to ensure each project is NPMS compliant;
- Managing documents for the PSPC and PMSS Project Managers such as change order docket preparation, setting up project document storage and management systems, document filing, document management, document security. Document management is to include library support, historical recording type work, office documents, meeting minutes, reports, files, drawings (as-built records, etc.) in accordance with PSPC Records Management sector requirements;
- Developing and maintaining logs for each contract;
- Assisting with preparation submissions, project briefing notes, progress status reports, project quality reports, monthly reports, quarterly reports, and NPMS documents;
- Using and managing "on-line collaboration tools;"
- Assisting with the preparation of formal statement of work, work breakdown structure and evaluation materials;
- Preparing and coordinating documentation in response to reports and observation to update management of project progress;
- Contributing to research and analysis and carrying out fact finding activities for projects and or discipline areas;
- Acquiring, reviewing, recording, verifying and maintaining inputs, various data and information;
- Managing and maintaining electronic or manual files, maintaining a library of reference materials;
- Setting electronic folder system in accordance with the NPMS standard filing system;
- Responding to internal and external inquiries,
- Providing support services for various office management processes and e- business using tools such as word processing - MS Word, spreadsheet – Excel, presentations - MS PowerPoint and

MS Visio, document scanning to create *.PDF and *.JPEG documents, architectural and engineering drawing management support.

- Supporting and assisting PMs in administrative functions.
- Performing administrative tasks and participating in decision-making related to the planning an organization of work activities; and
- Assisting PM in filing/recording project documents.

1.2.6 Tasks and responsibilities - Financial/Cost Specialist for Real Property – Intermediate

The required services may include, but are not limited to the following:

- Preparing a cost and cash flow estimate (e.g., identifying the resources, levels of effort and related costs) required for the project;
- Forecasting costs for specific activities such as: direct project costs, project support overhead, corporate or administrative overhead, costs of products and services, leasing costs;
- Assisting with cost control using problem solving techniques such as life-cycle analysis, value engineering, risk analysis or early estimation (elemental cost analysis);
- Analyzing trends in the real estate or construction markets and forecasting the impact of such trends on project costs;
- Monitoring actual or expected costs against previously budgeted costs and preparing variance analysis (e.g. analyzing and reporting on costs to complete projects and actions to be taken to stay on budget including the state of risk allowances, reserves or contingencies);
- Preparing discounted cash-flow analysis including sensitivity analysis;
- Preparing value-for-money calculations using Monte Carlo Simulation;
- Preparing historic or pro forma financial statement or ratio analysis (based on financial, employment, spatial or other data); and
- Providing a review of a financial analysis prepared by a different party.
- Evaluating financial management procedures;
- Reviewing submissions prepared by consultants or contractors relevant to financial activities;
- Developing business plans or financial plans;
- Providing input to update the Master (baseline) Cost Plan through:
 - Site inspections;
 - Assessing the project design and budgets;
 - Ensuring a common understanding of all contingencies or allowances; and
 - Comparing and reconciling previous project budgets with the current budget.
- Providing approved budget, forecast, variances, actuals, billings, payments;
- Assisting with cost planning including:
 - Participating in cost planning of project options and "what if" scenarios;
 - Providing advice on cost planning in order to coordinate ongoing project procurement activities with information within the organization's financial system;
 - Identifying and quantifying potential risks and making contingency recommendations in order to minimize negative cost impacts; and
 - Identifying, forecasting and analyzing project related risks focusing on the presentation, documentation and use of risk allowances or risk reserves or general contingencies.
- Developing a detailed worksheet of sub-project annual funding, forecasts, value of work done over the life of the project;
- Reviewing and monitoring overall project budget on a regular basis using information provided from the project team;
- Highlighting variances and possible mitigation strategies to bring project costs back into budget;
- Providing regular reports of project cash flow, including forecasted requirements on an as-required basis; and
- Evaluating or applying governmental or industry (i.e. Generally Accepted Accounting Principles) methods in financial decision making as they relate to real property.

Further services include but not limited to:

- In conjunction with the Project Manager, creating and maintaining a 'black book' per project which includes a detailed summary of sub-projects indicating, on a yearly basis, project funding, forecasts and value of work done over the life of the project, including all spent costs to date. The 'black book' must include the project authority, expenditure authority, and project status. The 'black book' must be made available upon request from the PSPC Project Manager or Director and included as an annex to each monthly report;
- Analyzing PSPC financial systems and discussing with PSPC finance personnel to ensure that the project cost plan is properly reflected in PSPC financial system and proper expenses are posted to the correct projects;
- Assisting with cost control including:
 - Using Elemental Cost Analysis and Risk Analysis;
 - Monitoring and updating the overall cost control program in conjunction with the PM and document and report on projected cash flow for all phases of the project;
 - Analyzing and reporting on variances and reconcile the overall project Cost Plan with 'black book' and PSPC financial system data;
 - Preparing customized cost control reports paying particular attention to the presentation, documentation and usage of risk allowances, management reserves and general contingencies;
 - Reviewing various cost related submissions made by contractors, consultants and others; and
 - Reviewing budget commitments and expenses.
- Conducting monthly financial reviews;
- Developing and maintaining detailed Senate Accommodation Program financial reports per project;
- Overseeing change order and amendment process, while ensuring all documentation is in order and processed by PSPC finance;
- Monitoring forecast and ensuring that project forecasting goals are achieved;
- Assisting PSPC with fiscal year end deliverables such as PAYE's; and
- In collaboration with PM, developing the program of work.

1.2.7 Tasks and responsibilities - Project Planner for Real Property – Intermediate (Optional Services)

The required services may include, but are not limited to the following:

- Identifying project activities and creating and maintaining the project schedule, establishing a time control system, monitoring progress (including cost and schedule controls) and responding to variances;
- Formulating and maintaining master schedule of all activities and resources by defining deliverables, identifying key milestones and deadlines, reviewing project progress, and engaging in ongoing risk management. Identify (seasonal, site or client) specific impacts on timelines, timelines for work processes and approval periods to master schedule;
- Developing detailed cash flows as the project progresses to illustrate the sequencing of work and the inter-related activities;
- Communicating verbally and in writing with the Project Manager and with stakeholders to input modifications to the project schedule or the project Work Breakdown Structure;
- Visiting the site and providing timely input to update the Master Schedule Plan;

- Preparing an optimized project schedule, using Critical Path Methodology, to identify measures to shorten total project duration;
- Reviewing and monitoring overall project schedule on a regular basis using information provided from the project team; mitigate schedule delays as required;
- Maintaining schedule tracking and change management records;
- Documenting issues and resolutions related to the project schedule;
- Communicating with the Project Manager, management team or stakeholders regarding project status and deliverables using logic diagrams, bar charts and narrative reports; and
- Contributing to the development and management of process and procedures used in operations.

Further services include but not limited to:

- The Project Planner must deliver, control and maintain the following items:
 - Program Master Schedule;
 - Project Schedules;
 - Bar Charts identifying activity durations, early/late dates, total float, percent complete and budget amounts; and
 - Network logic diagrams showing all activity sequencing, critical path (activities), and inclusive of approved project milestones.
- The Project Planner must:
 - Ensure a clear understanding of the total project scope of work and timeline objectives;
 - Be proactive in the delivery and management of all professional services;
 - Ensure that the information provided by PSPC, the scope of services, the required deliverables, deadlines and communication and access protocols are clearly understood and respected;
 - Ensure deliverables provided are coordinated and reviewed prior to submissions;
 - Meet with the PM for each project on a monthly basis to review the overall project status and upcoming monthly activities and service requirements;
 - Provide planning, schedule, monitoring and control services;
 - Review, analyze, and report on schedules prepared by others;
 - Regular scheduling updating, reporting, monitoring, control, and analysis;
 - Assess delay claims; and
 - Assist the Project Managers

1.2.8 Quality Assurance/Management Specialist – Senior (Optional Services)

The required services may include, but are not limited to the following:

- Developing, deploying and evaluating policies, procedures, standards, initiatives, metrics, forms and tools for the quality management system;
- Verifying and confirming if the quality management system's process assets (policies, procedures and standards) are being adhered to;
- Leading process improvement initiatives, and facilitating/coaching teams which are performing process improvement initiatives;
- Managing and monitoring all aspects of the Quality Management System;
- Conducting conformance audits of the Quality Management System. Reporting results and recommending appropriate corrective actions to deal with the non-conformances;
- Tracking and reporting on the implementation of corrective actions. Confirming that corrective actions effectively addressed the root-causes of the non-conformances;
- Contributing to the development and implementation of an integrated approach to quality, risk and performance management for the organization;

- Providing leadership and support to the design, implementation and evaluation of performance/quality measurements of clients products/services (Program assessment/ranking and reporting, performance measurement capacity building, business performance/excellence);
- Using multiple Quality Management methodologies and tools to address the organization's business needs (Measurement and management of organizational performance);
- Developing process management by application of continuous improvement methodology;
- Preparing reports concerning the capabilities, strengths and weaknesses of the Quality Management Systems for internal or external publication which could be communicated to project management team through oral or written presentations (Basic statistical analysis techniques, questionnaire design and survey analysis. Ability to influence others, at all levels in the organization); and
- Liaising with and interviewing quality management specialists from other organizations.

1.2.9 Tasks and responsibilities - Risk Management Specialist – Senior (Optional Services)

The required services may include, but are not limited to the following:

- Conducting risk assessments and evaluating potential risk and losses;
- Identifying project and procurement risks;
- Reviewing and auditing claims;
- Recommending alternative solutions, methodologies and strategies for risk mitigation and management;
- Assisting in prioritization and assignment of risks;
- Assisting in the development and/or implementation of Risk Management Plans;
- Developing and managing the implementation of Risk Management Plans (safety programs) to identify, analyze, plan, track, evaluate and control project risks on a continuous basis throughout the project life cycle;
- Coaching, mentoring and training project teams in risk mitigation techniques;
- Developing and implementing business continuity plans;
- Developing crisis and emergency communication and/or management planning strategies;
- Reviewing the organization's insurance and risk management programs and making recommendations regarding coverage improvements, administration, loss control and financing mechanisms;
- Providing leadership and support to the design, implementation and evaluation of clients products/services performance measures, risk management and risk mitigation strategies;
- Documenting process improvements;
- Preparing reports for internal or external publication (Corporate Services, Policy, Communications)
- Liaising with and interviewing stakeholders, as required, to obtain, clarify and exchange information, in-order to co-ordinate and manage the Risk Assessment Process;
- Identifying, confirming and documenting the risk tolerance for the process, project, program, or strategic risk and using this tolerance to guide all analysis, assessment and recommendations undertaken or produced;
- Identifying, confirming and documenting the objectives and priorities specific to the process, project, program or strategic direction being assessed, feasibility studies;
- Identifying relevant risks and opportunities (including, but not limited to, economic, political, operational, legal, reputation, technical, organizational, accounting, banking and social risks) that threaten the objectives and priorities;
- Utilizing both quantitative and qualitative techniques, as appropriate, to assess the likelihood that a risk event will occur; and/or the impact if the risk event occurs;
- Recommending a ranked-order for risks and opportunities identified;

- Recommending and documenting suggested Risk Responses necessary to manage the likelihood and/or impact of the identified risks;
- Performing Control Risk Assessments and analysis, which may include statistical sampling and analysis of existing controls;
- Assisting with the on-going monitoring of risk and assisting with the implementation of risk response/mitigation strategies;
- Preparing draft and finalized risk assessments, briefing notes, presentations and papers related to risk management, and developing and updating risk management plans; and
- Providing advice with respect to risk management best practices and providing guidance and direction to assist in managing risk.

1.2.10 Tasks and responsibilities - Technical Writer – Intermediate (Optional Services)

The required services may include, but are not limited to the following:

- Analyzing material, such as specifications (technical Statement of Work/Requirement), notes, drawings, writing manuals, user guides and other documents to explain the requirement clearly and concisely;
- Modifying, validating and compiling documents such as technical publications in general, specifications, equipment and system data lists, drawings etc.;
- Gathering information, analyzing the subject and the audience, and producing clear documentation;
- Studying existing material and interviewing Stakeholders;
- Creating accurate, complete and concise documentation to communicate the needs of the requirement;
- Assimilating and conveying technical material in a concise, effective manner;
- Following governmental publishing guidelines;
- Reviewing documents, drawings and associated data for conformance to established standards;
- Planning, researching and writing manuals, specifications and other non-journalistic articles;
- Design the layout of the documents/manuals; and
- Uses word-processing, desk-top publishing and graphics software packages to produce final camera ready copy.

1.2.11 Tasks and responsibilities - Claims Analyst – Senior (Optional Services)

The required services may include, but are not limited to the following:

- Reviewing and analyzing project background data and reports with respect to contract issues, i.e. claims, change orders, schedule reports, delays analysis, disputed issues, etc.;
- Providing a complete detailed analysis of the monthly project schedule submissions commencing at the beginning of the project construction;
- Reviewing contractors As Built Critical Path Schedule and compare to the original Baseline Plan/schedule;
- Analyzing where schedule delays occurred and define critical/prime issues and causes (delay events) affecting the end date; impact of extension of time; identify concurrent delays;
- Providing a detailed project Delay Analysis;
- Identifying causes, circumstances and responsibilities (i.e. Contractor, consultant, PSPC) leading to delays and potential claims;
- Completing a change order analysis, including a review of Contemplated Change Notices (CCN) & Change Orders (CO). Include a history of each CO and identify if delays were caused, the extent and impacts on the end date;
- Establishing costs incurred by the Crown as a result of contractor-caused delays;
- Analyzing delay impact and associated costs resulting from the cumulative effect of numerous change orders;

- Assisting the Project Manager in determining why a contractor is claiming for additional costs that have not been covered by change orders; and
- Providing support in preparation for potential mediation.

RS 2 PROJECT PLANNING PHASE (AS PART OF NPMS PROJECT DELIVERY STAGE)

2.1 Scope and Activities

The Contractor must provide comprehensive services to manage each project through to completion of the Project Planning Phase. The scope and activities include the following areas of service delivery.

The Contractor must:

- Provide project management services for the preparation of updated functional or technical programs in cooperation with the A&E Team responsible for program definition;
- Review and confirm all components of the project plan(s), including scope, functional requirements, quality objectives, overall budget and schedule in cooperation with the A&E Team or contractor teams and PSPC;
- Review the preliminary implementation strategies proposed in all project plans, in cooperation with the A&E Team and PSPC;
- Develop an updated project management plan per project, noting project constraints, assumptions, inclusions and exclusion and all project implementation requirements and constraints of the Client /Users, PSPC, the site, cost, time, risk, etc...
- Prepare the project Work Breakdown Structure (WBS);
- Prepare and communicate project policies and procedures with respect to the consultants, contractors and stakeholders;
- Prepare and communicate project policies and procedures in support of PSPC administrative requirements;
- Preparation of a change management process that records changes to the scope of work. This must include changes deriving from Client / User requests, site condition discoveries and other factors and with due regard for financial authorities. The change management process must be organized and managed to be fully integrated with PSPC processes and be coordinated with the processes of the A&E Team and contractors. The process must be supported by a full description of roles and responsibilities, spreadsheet tracking templates and flow charts identifying the process;
- Prepare a master schedule, including the identification of timelines for design time, decision time and bid processes and milestones for input, decisions and approvals required by all project team members - PSPC, Senate, Library, HoC and other stakeholders;
- Advise on impacts to the project resulting from delayed decisions or approvals;
- Prepare a master cost plan by accounting for all projects;
- Prepare a preliminary procurement plan or update existing plans for all projects and establish a procurement strategy per project compatible with the requirements of PSPC. For common elements, establish a procurement strategy for the project;
- Provide logistical advice, analysis and support to develop the plan of occupant moves including options analysis;
- Develop and maintain the various PM systems and approaches for overall management and control of the project and each swing space project, such as:
 - A financial management system that is compatible with PSPC systems for reporting;
 - Definition and implementation of an approvals management system that will address, respond and report to the specific authorities having jurisdiction;
 - A system to ensure that all necessary permits, approvals, and licenses are in place;
 - Follow up with regulatory bodies to review outstanding issues;
 - Change management system that includes a defined contractual process for initiation, review and approval of project changes;
 - Reporting requirements and a communications plan for the project team;

- Protocols and security controls for electronic documents;
 - Electronic document management; and
 - Document access.
- Establish and maintain a risk management plan, per project;
- Organize, manage, participate in and document risk management sessions;
- Provide technical writing support for activities such as the following: Treasury Board submissions, project briefing notes, progress status reports, project quality reports, monthly reports and quarterly reports.

2.2 Deliverables

The PMSS Team must prepare and submit customized reports, Monthly Schedule Reports and an integrated PMSS Monthly Report each month during the Project Planning Phase, for review and approval by the PSPC Project Manager.

RS 3 PROJECT DESIGN PHASE (AS PART OF NPMS PROJECT DELIVERY STAGE)

3.1 Scope and Activities

The Contractor must provide comprehensive services to manage each project through to completion of the Design Phase. The scope and activities include the following areas of service delivery.

3.1.1 Design Review

The Contractor must ensure that initiatives are explored by each project team that allow PSPC to achieve their project objectives with respect to cost, schedule, quality, and specific for heritage and environmental objectives. The PMSS Team must:

- Coordinate with the A&E Team, Contractor or CM, opportunities and initiatives that would consider energy and sustainability components or other Green Globe type initiatives including the development of an applicable score card;
- Liaise with the A&E Team throughout the design process and ensure the Client / User's requirements are accurately interpreted;
- Review and update the implementation plan;
- Update the project Work Breakdown Structure (WBS);
- Implement and maintain a design change management process that records changes to the scope of work as detailed in the Request For Proposal;
- Coordinate any delays with A&E Team and Contractor or CM where appropriate to minimize impact on the project; and
- Coordinate a value engineering (VE) processes and manage the consideration and implementation of the outcomes from the VE process.

3.1.2 Cost Management

The Contractor must develop and update the project cost estimate. The Contractor must provide rigorous construction control with respect to the established project budgets and schedules. The PMSS Team must:

- Provide critical assessment to project budgets prepared by A&E Team;
- Prepare and present project budgets and cost plans;
- Ensure common, written understanding regarding the meaning and use of all contingencies, risk allowances, management reserves and other allowances;
- Compare and reconcile project budgets prepared by the A&E Team, with the PSPC Project Manager, for final acceptance. Once reconciled and accepted, the Contractor must ensure that the project is delivered within the approved budget, including recommendations for remedial action;
- Prepare and manage a cash flow program for the duration of all projects; and
- Review and monitor overall budgets and update with information received from the Project Team.

3.1.3 Risk Management

The Contractor must ensure there is adequate risk allocation available to mitigate the identified risks impacting all aspects of each project schedule, budget, and resources. The PMSS Team must:

- Organize, manage and participate in risk management sessions for the project;
- In consultation and through risk management review sessions with the A&E Team, PSPC, and other project stakeholders, develop a risk assessment and risk management plan per project;
- Develop and maintain a risk register;
- Using input from the risk assessment, establish acceptable amounts for inclusion in project cost plans;
- Provide advice on impacts to projects resulting from delayed decisions or approvals;
- Develop a work plan and schedule per project incorporating specific risk elements associated with prominence of building, security and public visibility; and
- Develop and maintain per project an issues and decision making logbook.

3.1.4 Schedule Management

The Contractor must develop and control the project schedule, which incorporates all aspects of each project including design, approvals, tendering, construction, commissioning and handover.

Establish a schedule base time-line at the outset of each project:

- Identify critical path, key milestones and key lead times for each project schedule;
- Identify resource loading constraints; and
- Monitor and report on project schedules identifying measures to shorten activity durations.

3.1.5 Procurement Support

The PMSS Team must lead and coordinate activities during procurement processes. The PMSS Team will be supported by PSPC procurement and the A&E Team. The PMSS Team must:

- Assist PSPC in selecting and retaining other consultants for professional services that may be required from time to time per project, including:
 - Development of appropriate terms of reference associated with this activity;
 - Update procurement plans for all project elements conforming to standards and guidelines as established by PSPC;
 - Review and develop tender evaluation summaries for recommendation to PSPC for award;
 - In cooperation with PSPC procurement, develop a methodology for pre-qualifying specific key suppliers and other identified pre-qualified components;
- Assist in the uniform preparation and tracking of change order dockets; and
- Coordinate with the Client/Users and PSPC procurement specialists for BCC components and systems.

3.1.6 Scope Management

The Contractor must develop, implement and manage a change control procedure inclusive of the project stakeholders. The PMSS Team must:

- Implement a change management process that allows information to be gathered and disseminated in support of timely decision-making. The process must incorporate Client / User change requests and their approval, consultant contract amendments, contemplated change notices, site instructions, change orders, and other PSPC and industry standard scope documentation;
- Define and implement reporting mechanisms for change; and
- Provide sufficient resources and expertise to manage the scope change to maintain an efficient process and ensure project delays are minimized.

3.1.7 Quality Management

The Contractor must establish a quality assurance (QA) program that is comprehensive and inclusive of all quality control components from design through to construction, commissioning, and close-out. The QA program must:

- Define the expectations for quality for each project phase, and include qualitative measures to monitor and report conformance;
- Maintain a corrective measures log for all non-conformance events;
- Ensure compliance by all project stakeholders to the quality standards as established by the Project Team;
- Monitor regularly through objective design reviews, contractibility reviews and building inspections; and
- Monitor performance of consultants and the contractors against the QA program requirements.

3.2 Deliverables

The PMSS Team must prepare and submit customized reports, Monthly Schedule Reports and an integrated PMSS Monthly Report each month during the Project Design Phase, for review and approval by the PSPC Departmental Representative

RS 4 PROJECT IMPLEMENTATION PHASE (AS PART OF NPMS PROJECT DELIVERY STAGE)

4.1 Scope and Activities

The Contractor must provide comprehensive services to manage each project through to completion of the Implementation Phase. The scope and activities include the following areas of service delivery.

4.1.1 Project Monitoring

The PMSS Team must monitor the project and ensure that the project objectives are being maintained throughout the execution of each project. The PMSS Team must also identify delays and risks and work with the Project Team to identify opportunities to mitigate risks that arise. The following activities are required to be executed by the PMSS Team.

4.1.2 Reporting and Communications

The PMSS Team must:

- Participate in project review meetings with the Project Team and issue minutes of these meetings in a timely fashion;
- Establish a protocol for all project communications and develop project communication plans for all projects, including a record keeping procedure;
- Provide coordination and a focal point for all project communications;
- Provide proactive construction events logistics coordination to manage and mitigate construction disruptions including:
 - Advance communications and coordination with PSPC, the Client / User and stakeholders;
 - Advance resolution of conflicts in the planning of construction events with PSPC, the Client / User and stakeholders; and
 - Draft briefing notes and communiqués on projects when required.

4.1.3 Scope Management

The PMSS Team must develop, implement and manage a change control procedure inclusive of the project stakeholders. The PMSS Team must:

- Implement a change management process that allows information to be gathered and disseminated in support of timely decision-making. The process shall incorporate Client / User change requests and their approval, consultant contract amendments, contemplated change

notices, site instructions, change orders, and other PSPC and industry standard scope documentation;

- Define and implement reporting mechanisms for change; and
- Provide sufficient resources and expertise to manage the scope change to maintain an efficient process and ensure project delays are minimized.

4.1.4 Quality Management

The PMSS Team must apply rigorous quality management practices to implement and maintain the approved Quality Assurance program. The PMSS Team must:

- Ensure the A&E Team, the Client/User, and other project stakeholders perform adequate inspections and provide timely reporting on the work and performance of contractors. The timing of inspections must occur to provide meaningful input prior to work progressing to the point where it is unacceptable, incompatible or inappropriate for the setting, thus requiring rework;
- Review and document deficiencies and any subsequent remediation plans and ensure the remediation plans are correctly implemented; and
- Oversee the safe and secure receipt, warehousing, installation and commissioning of all new building equipment to be deployed at the construction site.

4.1.5 Cost Control

The PMSS Team must apply rigorous controls with respect to the established budgets and will implement and maintain the cost control program as approved during the project implementation phase of each project. The PMSS Team must:

- Visit site to update the master cost plan for all project costs;
- Maintain financial tracking and management records and afford PSPC full and timely access to such;
- Maintain project cash flow and report monthly to PSPC of upcoming payment requirements; and
- Coordinate and implement changes necessary to bring the projected costs within budget, if required.

4.1.6 Schedule Control

The PMSS Team must apply rigorous time control techniques to maintain or improve project schedules approved during the project implementation phase of each project. The PMSS Team will:

- Review regularly, the design, design review and construction durations forming part of the project schedule, working with the A&E Team, Client / Users and with Contractors to mitigate potential schedule slippage;
- Update and validate the master schedule including the identification of timelines and milestones for input, decisions and approvals required by Project Team members; and
- Engage the Project Team proactively, to consider methods to reduce the schedule.

4.2 Deliverables

The PMSS Team must prepare and submit customized reports, Monthly Schedule Reports, and an integrated PMSS Monthly Report each month during the Project Implementation Phase, for review and approval by the PSPC Departmental Representative.

RS 5 PROJECT DELIVERY CLOSE-OUT PHASE (AS PART OF NPMS PROJECT DELIVERY STAGE)

The purpose of the Delivery Close-Out Phase is to complete the project management activities relative to the Delivery Stage of a project and to provide an assessment of the project performance against its objectives and requirements. It includes the completion of all contract administration activities, final evaluation of project teams including consultants and contractors, preparation of lessons learned, and the completion of the final records project plan.

5.1 Scope and Activities

The Contractor must provide comprehensive services to manage each project through to completion of the Close-out Phase. The scope and activities include the following areas of service delivery.

5.1.1 Contractual items

The Contractor must ensure each project is fully executed and all parties involved in the project meet all contractual obligations and that all financial issues are resolved, payments executed and deficiencies corrected. The PMSS Team will ensure that all:

- Deficiencies in the work are addressed and resolved;
- Notice of payments have been posted in accordance with industry requirements;
- Training has been executed as per contractual obligations and agreements;
- A&E Team warranty inspections are duly scheduled, implemented and reported upon. Further, if follow-up corrective measures to the built works are required then both the A&E Team and contractor follow through the corrective scope until the defect is properly resolved, to the satisfaction of PSPC; and
- Transfer of assets is completed.

5.1.2 Documentation

The Contractor must ensure that all final documentation for each project is compliant and turned over to PSPC in a manner that meets the requirements of the department and the PSPC Property Manager. The PMSS Team must:

- Coordinate the assembly and review all necessary project close-out information, including statutory declarations, warranties, as-built drawings, and operating manuals;
- Ensure all final municipal or other governmental authority having jurisdiction approvals and inspections are received; and
- Track and facilitate the issuance of Certificate of Completion(s) for all contracts.

5.1.3 Claims Management

The PMSS Team must:

- Analyze/evaluate claims in a surprise-free, 'team' environment approach;
- Consider each claim as being distinct, with its own costs or credits based on 'reasonableness' of arguments/costs presented by the contractor;
- Resolve claims promptly by being fair, open and transparent;
- Ensure that disputes do not degenerate into 'personality' conflicts;
- Ensure that adequate project records and photographs are retained for future reference;
- Ensure that senior management and all members of the Project Team are advised of the claims status;
- Use alternate resolution techniques: third party neutral, assisted negotiation, mediation;
- Provide third party review;
- Ensure the rights and obligations of the contractor are properly considered; and
- Ensure the rights of PSPC are exercised in regards to counterclaims and assessments;

5.1.4 Final Reports

The PMSS Team must complete a final report on each project for PSPC, including:

- Final cost report;
- Details of outstanding issues;
- Final Risk Management Plan;
- Lessons Learned reports;
- Transfer of ownership; and
- Details of warranties and the obligations of contractors.

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5.2 Deliverables

The PMSS Team must prepare and submit customized reports, Monthly Schedule Reports and an integrated PMSS Monthly Report each month during the Project Close-Out Phase, for review and approval by the PSPC Departmental Representative.

ANNEX B, BASIS OF PAYMENT

A- Contract Period

During the period of the Contract, for Work performed in accordance with the Contract, the Contractor will be paid as specified below.

1.0 Professional Fees

The Contractor will be paid all-inclusive fixed time rates as follows:

CONTRACT PERIOD: From _____ to _____ (Year 1 to 2)				
Consultant Category	Level of Expertise	Name of Proposed Resources	Firm Hourly Rate (Year 1)* From-----to -----	Firm Hourly Rate (Year 2)* From-----to -----
Project Leader for Real Property	Senior		\$	\$
Project Manager for Real Property	Senior		\$	\$
Project Manager for Real Property (Construction)	Senior		\$	\$
Project Manager for Real Property	Intermediate		\$	\$
Project Administrator for Real Property	Intermediate		\$	\$
Financial / Cost Specialist for Real Property	Intermediate		\$	\$
Project Planner for Real Property	Intermediate		\$	\$
Quality Assurance / Management Specialist	Senior		\$	\$
Risk Management Specialist	Senior		\$	\$
Technical Writer	Intermediate		\$	\$
Claims Analyst	Senior		\$	\$

For the purpose of this Contract, a day is defined as 7.5 hours of work, exclusive of meal breaks. Payment will be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave. If time worked is more or less than a day, the all-inclusive fixed daily rate must be prorated to reflect the actual time worked.

*** ESCALATION CLAUSE**

The firm hourly rates detailed in the above table will be adjusted annually on the start date of each new Contract Year (starting with Contract Year 2 and for the whole period of the contract including the option periods) by the amount established based on the annual average percentage increase (decrease) in the monthly index of the Consumer Price Index for Canada, All-Items (Not Seasonally Adjusted), published in Statistics Canada Catalogue no.62-001-X, Table 5, for the 12-month period ending 2 months prior to the new Contract Year Start date.

Example:

Contract Start Date: March 1, 2016

At the start of Contract Year 2 (i.e. March 1, 2017), the Contract Year 1 rates as stated in the Additional Bidders Services Table would be increased by 1.3% based on the following assumptions:

	% Change in Monthly CPI
February 2016	1.1%
March 2016	1.2%
April 2016	0.9%
May 2016	0.9%
June 2016	1.1%
July 2016	1.0%
August 2016	1.4%
September 2016	1.6%
October 2016	1.6%
November 2016	1.7%
December 2016	1.5%
January 2017	1.7%

$$15.7\% / 12 = 1.3\%$$

To determine the Contract Year 3 rates, the Contract Year 2 rates calculated above would be adjusted using the same Statistics Canada Table and same formula with data for the February 2017 - January 2018 12-month period.

2.0 Cost Reimbursable Expenses

2.1 Travel and Living Expenses - National Joint Council Travel Directive

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work done, delivered or performed outside the National Capital Region (NCR) defined in the *National Capital Act (R.S.C., 1985, c. N-4)*, available on the Justice Website (<http://laws-lois.justice.gc.ca/eng/acts/N-4/page-9.html#docCont>), at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, and private vehicle allowances specified in Appendices B, C and D of the [National Joint Council Travel Directive](#), and with the other provisions of the directive referring to "travelers", rather than those referring to "employees". Canada will not pay the Contractor any incidental expense allowance for authorized travel.

All travel must have the prior authorization of the Project Authority.

All payments are subject to government audit.

Estimated Cost: \$ 1500.

B- Options to Extend the Term of the Contract

This section is only applicable if the options to extend the Contract is exercised by Canada.

During the extended periods of the Contract specified below, the Contractor will be paid as specified below to perform all the Work in relation to the Contract extensions.

B-1 Extended Contract Periods

1.0 Professional Fees

The Contractor will be paid all-inclusive fixed time rates as follows:

OPTION 1 - CONTRACT PERIOD: From _____ to _____ (Year 3 to 4)				
Consultant Category	Level of Expertise	Name of Proposed Resources	Firm Hourly Rate (Year 3)* From-----to -----	Firm Hourly Rate (Year 4)* From-----to -----
Project Leader for Real Property	Senior		\$	\$
Project Manager for Real Property	Senior		\$	\$
Project Manager for Real Property (Construction)	Senior		\$	\$
Project Manager for Real Property	Intermediate		\$	\$
Project Administrator for Real Property	Intermediate		\$	\$
Financial / Cost Specialist for Real Property	Intermediate		\$	\$
Project Planner for Real Property	Intermediate		\$	\$
Quality Assurance / Management Specialist	Senior		\$	\$
Risk Management Specialist	Senior		\$	\$
Technical Writer	Intermediate		\$	\$
Claims Analyst	Senior		\$	\$

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OPTION 2 - CONTRACT PERIOD: From _____ to _____ (Year 5 to 6)				
Consultant Category	Level of Expertise	Name of Proposed Resources	Firm Hourly Rate (Year 5)* From-----to -----	Firm Hourly Rate (Year 6)* From-----to -----
Project Leader for Real Property	Senior		\$	\$
Project Manager for Real Property	Senior		\$	\$
Project Manager for Real Property (Construction)	Senior		\$	\$
Project Manager for Real Property	Intermediate		\$	\$
Project Administrator for Real Property	Intermediate		\$	\$
Financial / Cost Specialist for Real Property	Intermediate		\$	\$
Project Planner for Real Property	Intermediate		\$	\$
Quality Assurance / Management Specialist	Senior		\$	\$
Risk Management Specialist	Senior		\$	\$
Technical Writer	Intermediate		\$	\$
Claims Analyst	Senior		\$	\$

OPTION 3 - CONTRACT PERIOD: From _____ to _____ (Year 7 to 8)				
Consultant Category	Level of Expertise	Name of Proposed Resources	Firm Hourly Rate (Year 7)* From-----to -----	Firm Hourly Rate (Year 8)* From-----to -----
Project Leader for Real Property	Senior		\$	\$
Project Manager for Real Property	Senior		\$	\$
Project Manager for Real Property (Construction)	Senior		\$	\$
Project Manager for Real Property	Intermediate		\$	\$
Project Administrator for Real Property	Intermediate		\$	\$
Financial / Cost Specialist for Real Property	Intermediate		\$	\$
Project Planner for Real Property	Intermediate		\$	\$
Quality Assurance / Management Specialist	Senior		\$	\$
Risk Management Specialist	Senior		\$	\$
Technical Writer	Intermediate		\$	\$
Claims Analyst	Senior		\$	\$

For the purpose of this Contract, a day is defined as 7.5 hours of work, exclusive of meal breaks. Payment will be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave. If time worked is more or less than a day, the all-inclusive fixed daily rate must be prorated to reflect the actual time worked.

*** ESCALATION CLAUSE**

The firm hourly rates detailed in the above table will be adjusted annually on the start date of each new Contract Year by the amount established based on the annual average percentage increase (decrease)

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in the monthly index of the Consumer Price Index for Canada, All-Items (Not Seasonally Adjusted), published in Statistics Canada Catalogue no.62-001-X, Table 5, for the 12-month period ending 2 months prior to the new Contract Year Start date.

Example:

Contract Start Date: March 1, 2016

At the start of Contract Year 2 (i.e. March 1, 2017), the Contract Year 1 rates as stated in the Additional Bidders Services Table would be increased by 1.3% based on the following assumptions:

	% Change in Monthly CPI
February 2016	1.1%
March 2016	1.2%
April 2016	0.9%
May 2016	0.9%
June 2016	1.1%
July 2016	1.0%
August 2016	1.4%
September 2016	1.6%
October 2016	1.6%
November 2016	1.7%
December 2016	1.5%
January 2017	1.7%
	15.7% / 12 = 1.3%

To determine the Contract Year 3 rates, the Contract Year 2 rates calculated above would be adjusted using the same Statistics Canada Table and same formula with data for the February 2017 - January 2018 12-month period.

2.0 Cost Reimbursable Expenses

2.1 Travel and Living Expenses - National Joint Council Travel Directive

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work done, delivered or performed outside the National Capital Region (NCR) defined in the *National Capital Act (R.S.C., 1985, c. N-4)*, available on the Justice Website (<http://laws-lois.justice.gc.ca/eng/acts/N-4/page-9.html#docCont>), at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, and private vehicle allowances specified in Appendices B, C and D of the [National Joint Council Travel Directive](#), and with the other provisions of the directive referring to "travelers", rather than those referring to "employees". Canada will not pay the Contractor any incidental expense allowance for authorized travel.

All travel must have the prior authorization of the Project Authority.

All payments are subject to government audit.

Estimated Cost: \$ 1500 for each of the 3 Options.

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ANNEX C – SECURITY REQUIREMENTS CHECK LIST

(See attached hereto)

ANNEX D – INSURANCE REQUIREMENTS

COMMERCIAL GENERAL LIABILITY INSURANCE

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
2. The Commercial General Liability policy must include the following:
 - a. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
 - b. Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
 - c. Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
 - d. Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
 - e. Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
 - f. Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
 - g. Employees and, if applicable, Volunteers must be included as Additional Insured.
 - h. Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
 - i. Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
 - j. Notice of Cancellation: The Contractor will provide the Contracting Authority thirty (30) days prior written notice of policy cancellation or any changes to the insurance policy.
 - k. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
 - l. Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.

- m. Non-Owned Automobile Liability – Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.
- n. Advertising Injury: While not limited to, the endorsement must include coverage piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.
- o. All Risks Tenants Legal Liability – to protect the Contractor for liabilities arising out of its occupancy of leased premises.
- p. Amendment to the Watercraft Exclusion to extend to incidental repair operations on board watercraft.
- q. Sudden and Accidental Pollution Liability (minimum 120 hours): To protect the Contractor for liabilities arising from damages caused by accidental pollution incidents.
- r. Litigation Rights: Pursuant to subsection 5(d) of the [Department of Justice Act](#), S.C. 1993, c. J-2, s.1, if a suit is instituted for or against Canada which the Insurer would, but for this clause, have the right to pursue or defend on behalf of Canada as an Additional Named Insured under the insurance policy, the Insurer must promptly contact the Attorney General of Canada to agree on the legal strategies by sending a letter, by registered mail or by courier, with an acknowledgement of receipt.

For the province of Quebec, send to:

*Director Business Law Directorate,
Quebec Regional Office (Ottawa),
Department of Justice,
284 Wellington Street, Room SAT-6042,
Ottawa, Ontario, K1A 0H8*

For other provinces and territories, send to:

*Senior General Counsel,
Civil Litigation Section,
Department of Justice
234 Wellington Street, East Tower
Ottawa, Ontario K1A 0H8*

A copy of the letter must be sent to the Contracting Authority. Canada reserves the right to co-defend any action brought against Canada. All expenses incurred by Canada to co-defend such actions will be at Canada's expense. If Canada decides to co-defend any action brought against it, and Canada does not agree to a proposed settlement agreed to by the Contractor's insurer and the plaintiff(s) that would result in the settlement or dismissal of the action against Canada, then Canada will be responsible to the Contractor's insurer for any difference between the proposed settlement amount and the amount finally awarded or paid to the plaintiffs (inclusive of costs and interest) on behalf of Canada.

Errors and Omissions Liability Insurance

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1. The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
2. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
3. The following endorsement must be included:

Notice of Cancellation: The Contractor will provide the Contracting Authority thirty (30) days prior written notice of policy cancellation or any changes to the insurance policy.

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ANNEX E – TASK AUTHORIZATION FORM

Contract Number		EP753–182670
Task Authorization (TA) Number		Instructions to the TA Authority: Enter the number
Contractor's Name and Address		
Instructions to the TA Authority: Enter the name and address here.		
Total Estimated Cost of Task (Applicable Taxes extra) before any revisions:		\$ _____ Instructions to the TA Authority: Enter the amount here.
TA Revisions Previously Authorized		
Instructions to the TA Authority: the information for the previously authorized revisions must be presented in ascending order of assigned revision numbers (the first revision must be identified as No. 1, the second as No. 2, etc). If no increase or decrease was authorized, enter \$0.00. Add rows, as needed		
TA Revision Number: _____ Instructions to the TA Authority: Enter the number here, as applicable.	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
TA Revision Number: _____ Instructions to the TA Authority: Enter the number here, as applicable.	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
TA Revision Number: _____ Instructions to the TA Authority: Enter the number here, as applicable.	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
TA Revision Number: _____ Instructions to the TA Authority: Enter the number here, as applicable.	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
TA Revision Number: _____ Instructions to the TA Authority: Enter the number here, as applicable.	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
New TA Revision		
Instructions to the TA Authority: the first revision must be identified as No. 1, the second as No. 2, etc. If no increase or decrease is authorized, enter \$0.00.		
TA Revision Number: _____ Instructions to the TA Authority: Enter the number here, as applicable.	Authorized Increase or Decrease (Applicable Taxes extra) \$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
Total Estimated Cost of Task (Applicable Taxes extra) after this revision:	\$ _____ Instructions to the TA Authority: Enter the amount here, as applicable.	
Contract Security Requirements (as applicable)		
This task includes security requirements. At STEP 1 a): check the applicable boxes. <input type="checkbox"/> No <input type="checkbox"/> Yes. Refer to the Security Requirements Checklist (SRCL) annex of the Contract.		
Remarks: At STEP 1 a), 2a) or 3, enter the remarks, if any, or enter : "N/A".		
Required Work		
Instructions to the TA Authority: The content of sections A, B, C and D below must be in accordance with the Contract. To view the instructions for Section A, click on the hyperlink.		

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SECTION A – Task Description of the Work Required Instructions for Section A

SECTION B – Applicable Basis of Payment Instructions for Section B

SECTION C – Cost Breakdown of Task Instructions for Section C

SECTION D– Applicable Method of Payment Instructions for Section D

Authorization – Authorization

By signing this TA, the Project Authority or the PSPC Contracting Authority or both, as applicable, certify (ies) that the content of this TA is in accordance with the Contract.

En apposant sa signature sur cette AT, le chargé de projet ou l'autorité contractante de TPSGC ou, s'il y a lieu, les deux atteste(nt) que le contenu de cette AT respecte les conditions du contrat.

Name of Project Authority – Nom du chargé de projet _____

Signature _____ Date _____

Name of PSPC Contracting Authority –
Nom de l'autorité contractante de TPSGC _____

Signature _____ Date _____

Contractor's Signature – Signature de l'entrepreneur

Name and title of individual authorized to sign for the Contractor
Nom et titre de la personne autorisée à signer au nom de l'entrepreneur

Signature _____ Date _____

ANNEX F – TEMPLATE FOR REPORTING ON THE RESULTS OF THE INDIGENOUS BENEFITS PLAN (IBP)

Report on Benefits to Indigenous Peoples, Indigenous Firms and Indigenous Communities in the Performance of the Contract.

Contractor's name: _____

Contractor's PBN: _____

Contract #: _____

Reporting Period: from _____ to _____ (format: 1
of January 2000)

Report prepared on: _____

(This report supersedes any previous report concerning the reporting period.)

A) Indigenous Project Resources Employed by the Contractor

Actual Participation – Indigenous Benefits Plan				
Indigenous Person's name	Rate of Pay	Hours Worked	Total Paid	Resource Category

B) On-the-Job Training, Skills Development, Apprenticeship provided by the Contractor for Indigenous Peoples

Actual Participation – Indigenous Benefits Plan		
Indigenous Person's name	Resource Category	Title of Training, Skills Development or Apprenticeship Provided

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C) Sub-contract – Services from Indigenous Firms acquired by the Contractor

Actual Participation – Indigenous Benefits Plan		
Indigenous Firm name	Amount paid	Service Category

D) Sub-Contract – Goods from Indigenous Firms acquired by the Contractor

Actual Participation – Indigenous Benefits Plan		
Indigenous Firm name	Amount paid	Goods Category

E) Other Benefits provided to Indigenous Communities provided by the Contractor

Actual Participation – Indigenous Benefits Plan		
Indigenous Community / Contact	Amount paid	Benefit Category