



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

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

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

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

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

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

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

**Comments - Commentaires**

THIS DOCUMENT CONTAINS A SECURITY  
REQUIREMENT

**Vendor/Firm Name and Address**

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

**Issuing Office - Bureau de distribution**

Consultant Services Division/Division des services  
d'experts-conseils  
L'Esplanade Laurier  
4th floor, East Tower  
140 O'Connor Street  
Ottawa  
Ontario  
K1A 0S5

<b>Title - Sujet</b> 1500 Bronson Rehabilitation Project	
<b>Solicitation No. - N° de l'invitation</b> EJ078-193032/A	<b>Date</b> 2019-09-10
<b>Client Reference No. - N° de référence du client</b> 20193032	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$FE-174-77705	
<b>File No. - N° de dossier</b> fe174.EJ078-193032	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2019-10-23</b>	<b>Time Zone Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Bismonte, Tatiana	<b>Buyer Id - Id de l'acheteur</b> fe174
<b>Telephone No. - N° de téléphone</b> (819) 664-3528 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> PWGSC 1500 Bronson Ave. Ottawa, Ontario Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

**THIS PROCUREMENT CONTAINS A SECURITY REQUIREMENT**

**REQUEST FOR PROPOSAL (RFP)**

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## **SUPPLEMENTARY INSTRUCTIONS TO PROPONENTS (SI)**

### **SI1 INTRODUCTION**

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

**SI2 PROPOSAL DOCUMENTS**

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

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

2. The following are the proposal documents:

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

Submission Requirements and Evaluation (SRE);

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

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

- (b) Subsection 4, 5 and 6 of section GI 3.4 (Phase Two Proposal evaluation and final rating) is deleted in its entirety and replaced with the following the general terms, conditions and clauses, as amended, identified in the Agreement clause;

- (c) Project Brief / Terms of Reference;

- (d) the document entitled "Doing Business with PWGSC Documentation and Deliverables Manual";

- (e) the **Security Requirements Check List (SRCL)**;

- (f) any amendment to the solicitation document issued prior to the date set for receipt of Phase Two proposals;

- (g) the proposal submitted at Phase One and Declaration/Certifications Form; and
  - (h) the proposal submitted at Phase Two and Price Proposal Form.
3. Submission of a proposal constitutes acknowledgment that the Proponent has read and agrees to be bound by these documents.

### SI3 QUESTIONS OR REQUEST FOR CLARIFICATION

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

### SI4 CANADA'S TRADE AGREEMENTS

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

### SI5 CERTIFICATIONS

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

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

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

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

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

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

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

## **SI6 SECURITY REQUIREMENT**

1. Before award of a contract, the following conditions must be met:
  - (a) the Proponent (or in the case of a Joint Venture, each member of the Joint Venture) must hold a valid organization security clearance as indicated in Supplementary Conditions SC1 and set out in the following table:

Consultants/Specialists (Firms)	Security Clearance (Reliability) at Bid Close
Proponent (Prime Consultant)	X
Conservation Architect	X
Structural Engineer (with Heritage Building Conservation Specialty)	X
Mechanical Engineer	X

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Electrical Engineer	X
Building Science Specialist	X
Interior Designer	X

- (b) the Proponent's Key Personnel requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Supplementary Conditions SC1 and set out in the following table:

Key Personnel Category (Individuals)	Security Clearance (Reliability) at Bid Close
Proponent (Prime Consultant)	X
Conservation Architect	X
Structural Engineer (with Heritage Building Conservation Specialty)	X
Mechanical Engineer	X
Electrical Engineer	X
Building Science Specialist	X
Interior Designer	X

- Proponents are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Proponent to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- For additional information on security requirements, proponents should refer to the Contract Security Program of Public Works and Government Services Canada ((<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

## SI7 - WEBSITES

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

Employment Equity Act

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

Federal Contractors Program (FCP)



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

Certificate of Commitment to Implement Employment Equity form LAB 1168

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

Ineligibility and Suspension Policy

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

Code of Conduct for Procurement

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

Lobbying Act

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

Buy and Sell

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

Supplier Registration Information

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

Consultant Performance Evaluation Report Form

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

Canadian economic sanctions

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

National Joint Council (NJC) Travel Directive

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

## **SI8 - FAIRNESS MONITOR**

Canada has engaged “Raymond Chabot Grant Thornton” as Fairness Monitor to monitor this procurement process.

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## TERMS, CONDITIONS AND CLAUSES

### AGREEMENT

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

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

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

## **SUPPLEMENTARY CONDITIONS (SC)**

### **SC1 SECURITY REQUIREMENT**

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

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid **Designated Organization Screening (DOS)**, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC.

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

## **SC2 LANGUAGE REQUIREMENTS**

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

## **AGREEMENT PARTICULARS**

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

**APPENDIX A - TEAM IDENTIFICATION FORMAT**

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

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

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

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

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

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

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

**Conservation Architect**

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

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

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

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**APPENDIX A - TEAM IDENTIFICATION FORMAT (CONT'D)**

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

**Structural Engineer (with heritage building conservation specialty)**

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

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

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

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

**Mechanical Engineer**

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

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

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

**APPENDIX A - TEAM IDENTIFICATION FORMAT (CONT'D)**

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

**Electrical Engineer**

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

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

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

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

**Building Science Specialist**

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

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

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.....  
.....  
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**APPENDIX A - TEAM IDENTIFICATION FORMAT (CONT'D)**

**VII. Interior Designer**

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

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

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.....  
.....  
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**APPENDIX B - DECLARATION/CERTIFICATIONS FORM****Project Title:****Name of Proponent:****Street Address:****Mailing Address:****Address of Proponent's Proposed Site or premises Requiring Safeguard Measures (refer to SI6 Security Requirement):**

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

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City, Province, Territory

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Postal Code**Telephone Number: (    )****Fax Number: (    )****E-Mail:****Procurement Business Number:**

<b>Type of Organization:</b>  _____ Sole Proprietorship  _____ Partnership  _____ Corporation  _____ Joint Venture	<b>Size of Organization:</b>  Number of Employees _____  Graduate Architects / Professional Engineers _____  Other Professionals _____  Technical Support _____  Other _____
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**APPENDIX B - DECLARATION/CERTIFICATIONS FORM (CONT'D)****Federal Contractors Program for Employment Equity - Certification**

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

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

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

Complete both A and B.

A. Check only one of the following:

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

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

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

**OR**

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

B. Check only one of the following:

- ( ) B1. The Proponent is not a Joint Venture.

**OR**

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

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

### Former Public Servant (FPS) - Certification

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

### Definitions

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

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

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

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

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

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

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

YES ( ) NO ( )

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

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

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

### **Work Force Adjustment Directive**

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

If so, the Proponent must provide the following information:

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

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

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**APPENDIX B - DECLARATION/CERTIFICATIONS FORM (CONT'D)****Name of Proponent:****DECLARATION:**

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

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

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

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

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

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

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**APPENDIX C - PRICE PROPOSAL FORM**

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

PROPOSERS SHALL NOT ALTER THIS FORM

**Project Title:**        **1500 Bronson Rehabilitation Project**

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

---

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

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**REQUIRED SERVICES** including all related costs, services and deliverables to complete the services as specified in the Project Brief and in the RFP documents:

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

SERVICES	FIXED FEE
RS1 Design Management	\$.....
RS2 Pre-Design	\$.....
RS3 Schematic Design	\$.....
RS4 Design Development	\$.....
RS5 Construction Documentation	\$.....
RS6 Construction Tender	\$.....
RS7 Construction and Contract Administration	\$.....
RS8 Commissioning	\$.....
RS10 Bilingual Documents	<u>\$.....</u>
<b>MAXIMUM FIXED FEES FOR REQUIRED SERVICES</b>	<b>\$.....(1)</b>

**APPENDIX C - PRICE PROPOSAL FORM (CONT'D)****Time Based Fees** (R1230D (2018-06-21), GC 5 - Terms of Payment– Architectural and/or Engineering Services)

<b>RS8 Commissioning</b>	<b>ESTIMATED HOURS Column A</b>	<b>HOURLY RATES** Column B</b>	<b>TIME BASED FEE Columns AxB</b>
Independent 3 <sup>rd</sup> Party Commissioning Agent (Senior Engineer) based on 40 hours per week x 30 weeks	1,200	\$.....	\$.....
<b>MAXIMUM TIME BASED FEES</b>			<b>\$.....(2)</b>

<b>RS9 Resident Site Services</b>	<b>ESTIMATED HOURS Column A</b>	<b>HOURLY RATES** Column B</b>	<b>TIME BASED FEE Columns AxB</b>
Resident Site Representative (Senior Architect) based on 40 hours per week x 115 weeks	4,600	\$.....	\$.....
<b>MAXIMUM TIME BASED FEES</b>			<b>\$.....(3)</b>

\*Payment will be based on actual hours spent. Travel time and/or expenses will not be reimbursed separately (Refer to R1230D (2018-06-21), GC 5.12 – Disbursements).

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

**TOTAL FEE FOR TIME BASED FEES** **\$.....(2) + (3)**

**ADDITIONAL SERVICES** if and when required

**Firm Hourly Rates** Hourly Rates\*\* to be based on the Proponents hourly rate for the Proponent's Personnel inclusive of payroll costs, overhead and profit for Additional Personnel. Payment for any additional services or personnel will be based on these hourly rates and paid on the basis of actual hour worked. See table below.



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

\*\*The Hours in Column 1 are for bid evaluation purposes only and do not represent any hours or estimate of hours associated with the project. The quantities and categories of personnel identified below are for evaluation purposes only and shall not be interpreted to be a commitment by Canada to request the additional services of any of the personnel for any quantity of hours whatsoever.

For the categories where a Senior, Intermediate and/or Junior Personnel is requested, the hourly all-inclusive rate must demonstrate a level of salary progression reflective of the seniority of the resource. For example, the hourly all-inclusive rate of a senior personnel must be equal to or greater than the hourly all-inclusive rate of the intermediate personnel and the hourly all-inclusive rate of an intermediate personnel must be equal to or greater than the hourly all-inclusive rate of the junior personnel within that category.

**The hourly rates for any given category of personnel cannot be \$0.00 or nil value or identified as not applicable. Failure to insert an hourly rate for each position listed will render your proposal non-responsive.**

	HOURS Column 1	HOURLY RATES Column 2	Total Column 1 X Column 2
<b>Principals</b>			
Principal in Charge	200		\$
Lead Project Architect	200		\$
Lead Conservation Architect	200		\$
Lead Structural Engineer (with Building Conservation Specialty)	200		\$
Lead Mechanical Engineer	200		\$
Lead Electrical Engineer	200		\$
Lead Civil Engineer	200		\$
Lead Landscape Architect	200		\$



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

Architectural Staff Senior	400		\$
Architectural Staff Intermediate	800		\$
Architectural Staff Junior	800		\$
Sustainable Design Specialist	400		\$
Quality Control Specialist	200		\$
Specification Writer	400		\$
Contract Administrator	800		\$
Cost Specialist	200		\$
Time Specialist	200		\$
Geoexchange Specialist	200		\$
Code and Life Safety Consultant	200		\$
Acoustics Specialist	200		\$
Security Consultant	400		\$
Building Information Modelling Specialist	400		\$

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**APPENDIX C – PRICE PROPOSAL FORM (CONT)****Structural**

Senior Structural Engineer with Building Conservation Specialty	400		\$
Intermediate Structural Engineer	600		\$
Junior Structural Engineer	600		\$
Technologist	800		\$

**Mechanical**

Senior Mechanical Engineer	400		\$
Intermediate Mechanical Engineer	600		\$
Junior Mechanical Engineer	600		\$
Mechanical Technologist	800		\$
Commissioning Specialist	500		\$

**Electrical**

Senior Electrical Engineer	400		\$
Intermediate Electrical Engineer	600		\$
Junior Electrical Engineer	600		\$
Electrical Technologist	800		\$
Commissioning Specialist	500		\$

**Site/Civil**

Senior Civil Engineer	400		\$
Intermediate Civil Engineer	600		\$
Junior Civil Engineer	800		\$
Senior Landscape Architect	400		\$
Intermediate Landscape Architect	600		\$
Junior Landscape Architect	800		\$

**Interior Design**

Senior Interior Designer	500		\$
Intermediate Interior Designer	600		\$
Junior Interior Designer	800		\$

**Building Science Specialist**

Senior Specialist	300		\$
Intermediate Specialist	600		\$
Junior Specialist	800		\$

**TOTAL FEE FOR ADDITIONAL SERVICES \$.....(4)**

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

Total Fee for Required Services	\$.....(1)
Total Fee for Time Based Fees	\$.....(2+3)
Total for Additional Services	\$.....(4)
<b>Total Evaluated Fee</b>	<b>\$.....(1+2+3+4)</b>

Any errors in the addition or multiplication of the amounts in the Price Proposal Form Sections (1), (2), (3), and (4) above will be corrected by Canada to obtain the Total Evaluated Fee. In the case of error in the extension or addition of unit prices, the unit price will govern.

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

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

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

**DISBURSEMENTS**

At cost without allowance for mark-up or profit, supported by invoices/receipts - see clause R1230D (2018-06-21), GC 5 - Terms of Payment– Architectural and/or Engineering Services, section GC5.12 Disbursements:

Reproduction and delivery costs of technical documentation additional to that specified in the Project Brief with the prior approval and authorization of the Departmental Representative	\$ 50,000
Bilingual Documents (Beyond services stated in the RFP)	\$ 30,000
Materials Testing	\$ 50,000
Other Disbursements	\$ 50,000
<b>MAXIMUM AMOUNT FOR DISBURSEMENTS</b>	<b>\$180,000</b>

**END OF PRICE PROPOSAL FORM**

## **Appendix D - Doing Business with PWGSC**



## Doing Business with PWGSC

### Documentation and Deliverables Manual





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## Revisions

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

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# **1 General**

## **1.1 Effective Date**

January 12, 2018

## **1.2 Authority**

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

## **1.3 Purpose**

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

## **1.4 Scope**

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

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

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

## **1.6 Departmental Name Change**

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

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

## **1.7 Terminology**

This document utilizes the following terminology:

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

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## 1.8 Definitions

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

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

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

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

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

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## 2 Construction Documents

### 2.1 General

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

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

#### 2.1.1 Principles of PWGSC Contract Documents

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

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

#### 2.1.2 Translation

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

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

#### 2.1.3 Construction Documents Definitions

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

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

#### 2.1.4 Quality Assurance

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

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### 2.1.5 Quality Assurance Deliverables

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

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

### 2.1.6 Terminology & Quantities

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

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

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

### 2.1.7 Units of Measure

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

## 2.2 Drawings

### 2.2.1 General

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

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

### 2.2.2 Information to be Included

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

### 2.2.3 Title Blocks and Revision Notes

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

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

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## 2.2.4 Drawing Numbers

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

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

## 2.2.5 Presentation Requirements

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

## 2.2.6 Legends

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

## 2.2.7 Schedules and Tables

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

## 2.2.8 North Arrow

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

## 2.2.9 Drawing Symbols

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

## 2.2.10 As-Built Drawings

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

## 2.2.11 Submission Format

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

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### 2.2.11.1 Drawing Hard Copy Deliverable Format

Drawing submitted in hard copy shall be:

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

### 2.2.11.2 Drawing Electronic Copy Deliverable Format

Drawing submitted electronically shall be provided:

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

## 2.3 Building Information Modelling (BIM)

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

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

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

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

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

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

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

## 2.4 Specifications

### 2.4.1 National Master Specification

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

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



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## 2.4.2 Index

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

## 2.4.3 Specification Organization

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

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

## 2.4.4 Standards

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

## 2.4.5 Specifying Materials

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

### 2.4.5.1 Alternate Products and Materials

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

### 2.4.5.2 Sole Sourcing

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

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

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

Designated Contractor

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

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

Designated Contractor

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

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

## Materials

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

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

### Acceptable Materials

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

## 2.4.6 Measurement for Payment

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

### 2.4.6.1 Unit Prices

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

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

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

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

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

## 2.4.7 Cash Allowances

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

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

## 2.4.8 Warranties

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

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

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

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

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

## **2.4.9 Miscellaneous Requirements**

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

## **2.4.10 Specification Coordination**

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

## **2.4.11 Regional Guide**

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

## **2.4.12 Health and Safety**

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

## **2.4.13 Subsurface Investigation Reports**

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

Subsurface Investigation Report(s)

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

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

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

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

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

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

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

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

#### **2.4.15 Contracting Issues**

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

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

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

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

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

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

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

Specifications submitted electronically shall be:

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

### **2.5 Addenda**

#### **2.5.1 Format**

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

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

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

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### **2.5.2 Content**

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

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

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## 3 Cost Estimates

### 3.1 Cost Estimates Submission Formats

#### 3.1.1 Format

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

#### 3.1.2 Contents

All cost estimates shall contain the following:

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

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

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

### 3.2 Classes of Cost Estimates for Construction Projects

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

#### 3.2.1 Class D (Indicative) Estimate

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

#### 3.2.2 Class C Estimate

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

---

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

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

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

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

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

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

---

## 4 Project Schedules

### 4.1 Schedule Format

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

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

### 4.2 Progress Report

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

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

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

#### 4.2.1 Executive Summary

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

#### 4.2.2 Narrative Report

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

#### 4.2.3 Variance Report

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



---

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

#### 4.2.4 Criticality Report

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

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

#### 4.2.5 Exception Report

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

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

The exception report shall be provided in the following format:

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

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

---

#### 4.2.6 Master Schedule

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

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

#### 4.2.7 Detailed Project Schedule

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

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

## Appendix A Checklist for the Submission of Construction Documents

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

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

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

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

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

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

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

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

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

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

---

## Appendix B Drawings and Specifications Table of Contents Template

### B.1 General

List all drawings by number and title.

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

### B.2 Sample Table of Contents

---

<b>Project No:</b>	<b>Table of Contents</b>	<b>Index</b>
<hr/>		<b>Page 1 of ____</b>

---

#### DRAWINGS:

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

#### SPECIFICATIONS:

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



---

## Appendix C Addenda Formatting Template

### C.1 Instructions

To re-issue a drawing with an addendum:

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

To re-issue a specification with an addendum:

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

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

### C.2 Sample Addendum

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

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

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

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

#### **DRAWINGS:**

- 1 A1 Architecture  
.1

#### **SPECIFICATIONS:**

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

---

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

---

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

## - Y

Where:

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

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

For the “Drawings - Dessins” folder:

## = Y - Z

Where:

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

Y = the English title of the folder

Z = the French title of the folder

Example:

04 - Electrical – Électrique

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

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

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

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

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

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

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

## - Y

Where:

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

Y = the title of the folder

Example:

---

## 02 – Divisions

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

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

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

---

## D.2.6 Directory Structure Example

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

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

## D.3 Naming Convention for PDF Files

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

### D.3.1 Drawing File Names

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

X### - Y

Where:

---

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

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

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

Example:

A001 - First Floor Details

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

The following important points about drawings are to be noted:

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

### **D.3.2 Specifications**

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

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

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

## - Y

Where:

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

Y = Name of the document

Example:

01 – Drawings and Specifications Index

---

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

The specifications divisions must be named as follows:

Division ## - Y

Where:

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

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

Example:

Division 05 – Metals

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

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

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

Project Number / Numéro de projet

Project Title / Titre du projet

Documents for Tender / Documents pour appel d’offres

Disk X of/de X

Example:

Project 123456 / Projet 123456

Repair Alexandra Bridge / Réparation du pont Alexandra

Documents for Tender / Documents pour appel d’offres

Disk 1 of/de 1

---

## **Appendix E – Client Reference Forms**

(to be completed, signed and submitted with proposal)

Note: - Section A can be completed by the Proponent or the Proponent's client.  
- Section B must only be completed by the Proponent's client.  
- Substantial Performance is defined in GC1.1.4.1 of R2810D (2017-11-28)).

### **CLIENT REFERENCE FORM FOR PROJECT #1**

The project that is presented by the Proponent shall demonstrate the following requirements:

#### **Section A**

This hereby confirms that the following Consulting Firm :

---

Executed the services for the following project :

---

Project's Location:

---

Project's Scope of Work:

---

---

---

---

Consulting Firm's Services related to the Project:

---

---



Appendix E – Client Reference Forms (cont'd)

Section A (cont'd)

Consulting Firm’s Initial Contract Value (excl. tax)	Consulting Firm’s Contract Value (ex. tax) at Substantial Performance
--	---

<hr/>	<hr/>
<hr/>	<hr/>

Explain any variance between Consulting Firm’s initial contract value and contract value at Substantial Performance:

<hr/>
<hr/>

Initial Construction Contract Value (excl. tax)	Construction Contract Value (ex. tax) at Substantial Performance
---	--

<hr/>	<hr/>
<hr/>	<hr/>

Explain any variance between the Construction’s initial contract value and at Substantial Performance:

<hr/>
<hr/>

Initial Construction Substantial Performance date	Final Construction Substantial Performance date
---	---

<hr/>	<hr/>
<hr/>	<hr/>

Explain any variance between the Construction’s initial and final completion date for Substantial Performance

<hr/>
<hr/>



---

## **Appendix E – Client Reference Forms (cont'd)**

### **Section B**

I hereby certify the information provided in Section A to be true and factual to the best of my knowledge.

---

Client Name

---

Title

---

Signature

---

Company Name

---

Telephone

---

Date

---

**CLIENT REFERENCE FORM FOR PROJECT #2**

The project that is presented by the Proponent shall demonstrate the following requirements:

**Section A**

This hereby confirms that the following Consulting Firm :

---

Executed the services for the following project :

---

Project's Location:

---

Project's Scope of Work:

---

---

---

---

Consulting Firm's Services related to the Project:

---

---

---

---

---

## Appendix E – Client Reference Forms (cont'd)

### Section A (cont'd)

Consulting Firm's Initial Contract Value (excl. tax)

Consulting Firm's Contract Value (ex. tax) at  
Substantial Performance

---

---

---

---

Explain any variance between Consulting Firm's initial contract value and contract value at Substantial Performance:

---

---

Initial Construction Contract Value (excl. tax)

Construction Contract Value (ex. tax) at  
Substantial Performance

---

---

---

---

Explain any variance between the Construction's initial contract value and at Substantial Performance:

---

---

Initial Construction Substantial Performance date

Final Construction Substantial Performance date

---

---

---

---

Explain any variance between the Construction's initial and final completion date for Substantial Performance

---

---

---

## **Appendix E – Client Reference Forms (cont'd)**

### **Section B**

I hereby certify the information provided in Section A to be true and factual to the best of my knowledge.

---

Client Name

---

Title

---

Signature

---

Company Name

---

Telephone

---

Date

---

**CLIENT REFERENCE FORM FOR PROJECT #3**

The project that is presented by the Proponent shall demonstrate the following requirements:

**Section A**

This hereby confirms that the following Consulting Firm :

---

Executed the services for the following project :

---

Project's Location:

---

Project's Scope of Work:

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---

Consulting Firm's Services related to the Project:

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## Appendix E – Client Reference Forms (cont'd)

### Section A (cont'd)

Consulting Firm's Initial Contract Value (excl. tax)

Consulting Firm's Contract Value (ex. tax) at  
Substantial Performance

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---

Explain any variance between Consulting Firm's initial contract value and contract value at Substantial Performance:

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Initial Construction Contract Value (excl. tax)

Construction Contract Value (ex. tax) at  
Substantial Performance

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Explain any variance between the Construction's initial contract value and at Substantial Performance:

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Initial Construction Substantial Performance date

Final Construction Substantial Performance date

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---

Explain any variance between the Construction's initial and final completion date for Substantial Performance

---

---





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## **Appendix E – Client Reference Forms (cont'd)**

### **Section B**

I hereby certify the information provided in Section A to be true and factual to the best of my knowledge.

---

Client Name

---

Title

---

Signature

---

Company Name

---

Telephone

---

Date

## **APPENDIX F– SECURITY REQUIREMENTS CHECKLIST (SRCL)**

Government  
of CanadaGouvernement  
du Canada

Contract Number / Numéro du contrat

EJ078-19-3032

Security Classification / Classification de sécurité  
UNCLASSIFIEDSECURITY REQUIREMENTS CHECK LIST (SRCL)  
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine		2. Branch or Directorate / Direction générale ou Direction RPB
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant
4. Brief Description of Work / Brève description du travail Prime Consultant Design Services for the rehabilitation of 1500 Bronson		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Non Oui		
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Non Oui		
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c) <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Non Oui		
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes Non Oui		
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Non Oui		
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information		
PROTECTED A PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A PROTÉGÉ A <input type="checkbox"/>
PROTECTED B PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B PROTÉGÉ B <input type="checkbox"/>
PROTECTED C PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>
SECRET SECRET <input type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET SECRET <input type="checkbox"/>
TOP SECRET TRÈS SECRET <input type="checkbox"/>		TOP SECRET TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité  
UNCLASSIFIED

Canada



Government of Canada  
Gouvernement du Canada

Contract Number / Numéro du contrat

EJ078-19-3032

Security Classification / Classification de sécurité  
UNCLASSIFIED

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

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

If Yes, indicate the level of sensitivity:  
Dans l'affirmative, indiquer le niveau de sensibilité :

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

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

Document Number / Numéro du document :

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

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

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

Special comments:

Commentaires spéciaux :

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

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

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

If Yes, will unscreened personnel be escorted?

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

**PRODUCTION**

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

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

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

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

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité  
UNCLASSIFIED

Canada

Government  
of CanadaGouvernement  
du Canada

Contract Number / Numéro du contrat

EJ078-19-3032

Security Classification / Classification de sécurité  
UNCLASSIFIED**PART C - (continued) / PARTIE C - (suite)**

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.  
Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.  
Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

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

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

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

☒ No  
Non☐ Yes  
Oui**If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".****Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.**

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

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

☒ No  
Non☐ Yes  
Oui**If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).****Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).**

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**APPENDIX G: INFORMATION RELATED TO SECURITY REQUIREMENT**

<b>PROPONENT (Prime Consultant)</b>	
Legal Name of Firm:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	

<b>Sub-Consultants / Specialists (Conservation Architect)</b>	
Legal Name of Firm:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	

---

**APPENDIX G – INFORMATION RELATED TO SECURITY REQUIREMENT (CONT'D)**

<b>Sub-Consultants / Specialists (Structural Engineer with Building Conservation Specialty)</b>	
Legal Name of Firm:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	

<b>Sub-Consultants / Specialists (Mechanical Engineer)</b>	
Legal Name of Firm:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	



---

**APPENDIX G – INFORMATION RELATED TO SECURITY REQUIREMENT (CONT'D)**

<b>Sub-Consultants / Specialists (Electrical Engineer)</b>	
Legal Name of Firm:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	

<b>Sub-Consultants / Specialists (Building Science Specialist)</b>	
Legal Name of Firm:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	

---

**APPENDIX G – INFORMATION RELATED TO SECURITY REQUIREMENT (CONT'D)**

<b>Sub-Consultants / Specialists (Interior Designer)</b>	
Legal Name of Firm:	
Complete Address:	
Telephone Number:	
CISD File Number:	
Organization Security Clearance:	

The Proponent's Key Personnel identified in SRE 3.2.3 and any other proposed individuals must meet the security requirements as indicated in Supplementary Conditions SC1.

<b>KEY PERSONNEL – Prime Consultant</b>	
Legal Name of Individual:	
Name of Firm:	
Level of Security Clearance:	
Validity period of Security Clearance:	
Security Screening Certificate and Briefing Form File Number or CISD File Number:	

---

**APPENDIX G – INFORMATION RELATED TO SECURITY REQUIREMENT (CONT'D)**

<b>KEY PERSONNEL – Conservation Architect</b>	
Legal Name of Individual:	
Name of Firm:	
Level of Security Clearance:	
Validity period of Security Clearance:	
Security Screening Certificate and Briefing Form File Number or CISD File Number:	

<b>KEY PERSONNEL – Structural Engineer with Building Conservation Specialty</b>	
Legal Name of Individual:	
Name of Firm:	
Level of Security Clearance:	
Validity period of Security Clearance:	
Security Screening Certificate and Briefing Form File Number or CISD File Number:	

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**APPENDIX G – INFORMATION RELATED TO SECURITY REQUIREMENT (CONT'D)**

<b>KEY PERSONNEL – Mechanical Engineer</b>	
Legal Name of Individual:	
Name of Firm:	
Level of Security Clearance:	
Validity period of Security Clearance:	
Security Screening Certificate and Briefing Form File Number or CISC File Number:	

<b>KEY PERSONNEL – Electrical Engineer</b>	
Legal Name of Individual:	
Name of Firm:	
Level of Security Clearance:	
Validity period of Security Clearance:	
Security Screening Certificate and Briefing Form File Number or CISC File Number:	

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**APPENDIX G – INFORMATION RELATED TO SECURITY REQUIREMENT (CONT'D)**

<b>KEY PERSONNEL – Building Science Specialist</b>	
Legal Name of Individual:	
Name of Firm:	
Level of Security Clearance:	
Validity period of Security Clearance:	
Security Screening Certificate and Briefing Form File Number or CISD File Number:	

<b>KEY PERSONNEL – Interior Designer</b>	
Legal Name of Individual:	
Name of Firm:	
Level of Security Clearance:	
Validity period of Security Clearance:	
Security Screening Certificate and Briefing Form File Number or CISD File Number:	

## SUBMISSION REQUIREMENTS AND EVALUATION

SRE 1 General Information

SRE 2 Proposal Requirements

SRE 3 Phase One Submission Requirements and Evaluation

SRE 4 Phase Two Submission Requirements and Evaluation

SRE 5 Price of Services

SRE 6 Total Score

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## SUBMISSION REQUIREMENTS AND EVALUATION

### 1. SRE 1 GENERAL INFORMATION

#### 1.1 Calculation of Total Score

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

Phase One Rating x 30% = Phase One Score (Points)

Phase Two Technical Rating x 60% = Technical Score (Points)

Phase Two Price Rating x 10% = Price Score (Points)

Total Score = Max. 100 Points

#### 1.2 Site Visit

In Phase Two, one site visit will be scheduled for Proponents, but participation will not be mandatory.

### SRE 2 PROPOSAL REQUIREMENTS

#### 2.1 Requirement for Proposal Format (for phases one and two)

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

Phase One - Submit one (1) bound original plus six (6) bound copies of the proposal

Phase Two - Submit one (1) bound original plus six (6) bound copies of the proposal

Paper size should be - 216mm x 279mm (8.5" x 11")

Minimum font size - 11 point Times or equal

Minimum margins - 12 mm left, right, top, and bottom

Double-sided submissions are preferred

One (1) 'page' means one side of a 216mm x 279mm (8.5" x 11") sheet of paper

279mm x 432 mm (11" x 17") fold-out sheets for spreadsheets, organization charts etc. will be counted as two pages.

The order of the proposals should follow the order established in the Request for Proposal SRE section

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

The maximum number of pages (including text and graphics) to be submitted for the

Rated Requirements under SRE 3.2 is thirty (30) pages.

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

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

- Client Reference Form (Appendix E)
- Information Related to Security Requirement Appendix G
- Front page of revision(s) to the RFP

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

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

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

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

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

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

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

### **3.1 MANDATORY REQUIREMENTS**

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

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

The Proponent shall be an architect(s) licensed in the province of Ontario, or eligible to be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial or territorial law.

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

The Consultant Team to be identified at Phase One must include the following:

Proponent (prime consultant)

- Prime Architect

Key Sub-consultants / Specialists

- Conservation Architect
- Structural Engineer (with heritage building conservation specialty)
- Mechanical Engineer
- Electrical Engineer



- 
- Building Science Specialist
  - Interior Designer

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

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

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

The format to be used for submission of the team identification information is provided in Appendix A.

#### **3.1.3 Declaration/Certifications Form**

Proponents must complete, sign and submit the following:

- Appendix B, Declaration/Certifications Form as required

#### **3.1.4 Integrity Provisions – Required documentation**

In accordance with the Ineligibility and Suspension Policy (<http://www.tpsgcpwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Proponent must provide, as applicable, to be given

further consideration in the procurement process, the required documentation as per R1110T (2016-04-04), General instructions 1 (GI1), Integrity Provisions – Proposal, section 3a.

#### **3.1.5 Security Requirement**

Proponents must meet all the security requirements as specified in the Supplementary Instructions to Proponents SI6, Supplementary Conditions SC1.

To help PWGSC with the verification process, Proponent are being asked to complete Appendix G.

### **3.2 RATED REQUIREMENTS**

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

### **3.2.1 Achievements of Proponent on Projects**

Proponents should describe their accomplishments, achievements knowledge and experience as Prime Consultant on three (3) projects comparable, in terms of scope, scale and complexity of work to the project described in this RFP.

For at least two (2) of the three (3) projects, construction should have a value of at least \$30 million (excluding applicable taxes), and have either reached Substantial Performance (as defined in GC1.1.4.1 of R2810D (2017-11-28)) or have been completed within the last 10 years of Bid Close. The other (1) project presented should have a value of at least \$30 million (excluding applicable taxes) and should be significantly advanced (i.e. at least 50% of the construction completed by Bid Close). Only the first three (3) projects listed in sequence will receive consideration and any others will receive none as though not included.

The foregoing projects description should clearly demonstrate that the Proponent has experience in the following areas:

- a) Heritage conservation including rehabilitation, adaptive re-use, additions, and materials conservation work (masonry, metals, plaster);
- b) Abatement and selective demolition;
- c) Seismic upgrade of a heritage building;
- d) External stakeholder involvement;
- e) Replacement of building systems in a heritage building;
- f) High efficiency mechanical systems and geothermal heating;
- g) Building Envelope Upgrades
- h) Sustainable design
- i) Life cycle costing, and
- j) Value engineering.

Information that should be supplied:

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

- awards received

The Proponent (as defined in R1110T General Instructions to Proponents, GI2 Definitions) must possess the knowledge on the above projects. Past project experience from entities other than the Proponent will not be considered in the evaluation

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

Bidders must complete and submit Appendix E "CLIENT REFERENCE FORMS" for each project as validation of the Bidder's representative projects. If any of the information requested in Appendix E is not provided in the Bidders' submission, Canada will provide a timeframe by which it must be provided. Failure to provide the requested information will render the Bidder non-responsive.

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

Proponents should describe the Key Sub-Consultants' and Specialists (as described in Section 3.1.2) firms' accomplishments, achievements and experience either as Prime Consultant or in a Sub-consultant capacity on two (2) projects which are comparable in terms of scope, scale and complexity of work to the project described in this RFP. If the Proponent is providing the services of any or all of the key sub-consultants or specialists, the Proponent should provide all the information for such key sub-consultants and specialists in this subsection based on the Proponent being deemed to be such key sub-consultant or specialist, as the case may be.

For at least one (1) of the two (2) projects, construction should have reached Substantial Performance (as defined in GC1.1.4.1 of R2810D (2017-11-28)) or have been completed within the last 10 years by the bid close. The other project presented should be significantly advanced (i.e. at least 50% of the construction completed). Only the first 2 projects listed in sequence (per key sub consultant or specialist) will receive consideration and any others will receive none as though not included.

The foregoing projects description should clearly demonstrate that such KeySub-Consultants and Specialists firms have experience in the following areas:

- a) Heritage conservation
- b) Abatement and selective demolition
- c) Seismic upgrade of a heritage building
- d) Replacement of building systems in a heritage building
- e) High efficiency mechanical systems and geothermal heating
- f) Building Envelope Upgrades
- g) Sustainable design
- h) Life cycle costing and

---

i) Value engineering.

Information that should be supplied:

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

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

The Proponent should provide CVs that describe the expertise, performance, achievements and experience of Key Personnel identified in Appendix A regardless of their past association with the current Proponent firm. This is the opportunity to emphasize the strengths of the individuals on the team, to recognize their past responsibilities, commitments and achievements. All Key Personnel identified should have at least 10 years' experience in their field of expertise. If multiple functions are proposed to be performed by one Key Personnel, it should be identified here.

Information that should be supplied:

- Individuals name, title and name of firm
- Professional accreditation details (province, year, status, etc.)
- A description of expertise and experience (with number of years) relevant to this project
- A demonstration of roles, responsibilities and degree of involvement of individual on past projects that will corroborate the person's experience and expertise.
- Special accomplishments / achievements / awards

## **3.3 EVALUATION AND RATING**

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

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

	Criterion	Weight Factor	Rating	Weighted Rating
3.2.1	Achievements of Proponent on Projects	4.0	0 - 10	0 - 40
3.2.2	Achievements of Key Sub-consultants / Specialists on Projects	3.0	0 - 10	0 - 30
3.2.3	Achievements of Key Personnel on Projects	3.0	0 - 10	0 - 30
	<b>Phase One Rating</b>	<b>10.0</b>		<b>0 - 100</b>

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

#### Generic Evaluation Table

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

	INADEQUATE	WEAK	ADEQUATE	FULLY SATISFACTORY	STRONG
0 point	2 points	4 points	6 points	8 points	10 points
Did not submit information which could be evaluated	Lacks complete or almost complete understanding of the requirements.	Has some understanding of the requirements but lacks adequate understanding in some areas of the requirements.	Demonstrates a good understanding of the requirements.	Demonstrates a very good understanding of the requirements.	Demonstrates an excellent understanding of the requirements.
	Weaknesses cannot be corrected	Generally doubtful that weaknesses can be corrected	Weaknesses can be corrected	No significant weaknesses	No apparent weaknesses
	Proponent do not possess qualifications and experience	Proponent lacks qualifications and experience	Proponent has an acceptable level of qualifications and experience	Proponent is qualified and experienced	Proponent is highly qualified and experienced

	Team proposed is not likely able to meet requirements	Team does not cover all components or overall experience is weak	Team covers most components and will likely meet requirements	Team covers all components - some members have worked successfully together	Strong team - has worked successfully together on comparable projects
	Sample projects not related to this requirement	Sample projects generally not related to this requirement	Sample projects generally related to this requirement	Sample projects directly related to this requirement	Leads in sample projects directly related to this requirement
	Extremely poor, insufficient to meet performance requirements	Little capability to meet performance requirements	Acceptable capability, should ensure adequate results	Satisfactory capability, should ensure effective results	Superior capability, should ensure very effective results

## SRE 4 PHASE TWO SUBMISSION REQUIREMENTS AND EVALUATION

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

### 4.1 MANDATORY REQUIREMENTS

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

- Having submitted a responsive Phase One proposal
- Having carried over the Consultant Team identified in Phase One to Phase Two.

### 4.2 RATED REQUIREMENTS

The following requirements will be evaluated and rated by a PWGSC Evaluation Board.

#### 4.2.1 Understanding of the Project:

The Proponent should demonstrate understanding of the goals of the project, the functional/technical requirements, the constraints and the issues that will affect the design, delivery and implementation of the project.

Information that should be supplied:

- An interpretation of the project's functional and technical requirements including the interrelation of complementary and / or co-dependent project components.

- A critical assessment of broader goals as they relate to heritage conservation, sustainable development and site sensitivities.
- The relationship between this commission and key studies previously completed by PWGSC
- Demonstrate an understanding of project significant issues, challenges and constraints.
- Demonstrate an understanding of Project Implementation strategy.
- Demonstrate an understanding of the project schedule and cost and provide a high-level risk management strategy for both schedule and cost.
- Integration Strategy which would discuss the integration with the PWGSC separately contracted consultants and General Contractor
- Demonstrate an understanding of the project Stakeholders
- Demonstrate an understanding of the application of sustainability principles, life cycle costing and value engineering for this project.

#### **4.2.2 Design Philosophy / Approach / Methodology**

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

Information that should be supplied:

- Architectural Vision specific to this project
- Design Philosophy / Approach / Methodology
- Describe the major challenges and how your team approach will be applied to those particular challenges, including those related to achieving sustainability targets as well as designing the Phase 2 Fit-Up after the design of the Phase 1 Base Building is well underway
- A conservation approach that demonstrates understanding of the significance of this Classified federal heritage building's values.

#### **4.2.3 Scope of Services:**

The Proponent should demonstrate an understanding of the full scope of service for this project. Describe the Proponent's capability to perform the services and meet project challenges. Describe how the Proponent proposes to organize, manage and achieve the delivery of all project services and deliverables.

Information that should be supplied:

- A demonstration of the Proponent's understanding of the full scope of services and deliverables required for this project
- Quality Assurance and Control Methodology

- 
- Project Time Control – proposed methodology, including an explanation of how control will be applied to maintain the project
  - Project Cost Control – proposed methodology, including an explanation of how cost control will be applied to maintain the project budget
  - Risk management strategy – including risk techniques applied to project budget and schedule

#### **4.2.4 Management of Services:**

The Proponent should describe their internal processes and methodologies to ensure that all project services are delivered on time, on budget, on scope and at the highest level of quality; how they propose to perform the services and meet the project constraints; how the services will be managed to ensure continuing and consistent control as well as production and communication efficiency; how the team will be organized and how it will fit in the existing structure of the firms; to describe how the team will be managed. The proponent is also to identify sub-consultants, including Principal resident site representative, disciplines and specialists required to complete the consultant team.

Refer to supplementary Sub-Consultants/Specialist in section PD 7 Consultant Services. If the Proponent proposes to provide multi-disciplinary services which might otherwise be performed by a sub-consultant, this should be reflected here.

Information that should be supplied:

- Confirm the makeup of the full project team including the names of the consultant sub consultants and specialists' personnel and their role on the project.
- Organization chart with position titles and names for the Consultant Team, including what back-up will be committed and reporting relationships. Joint Venture business plan, team structure and responsibilities, if applicable
- Profiles of the key positions (specific assignments and responsibilities) including principal resident site representative.
- Outline of an action plan of the services with implementation strategies and sequence of main activities
- Work Plan - detailed breakdown of work tasks and deliverables including all required reviews and approvals; clear assignment of responsibilities for activities and deliverables to project team personnel with an estimation of levels of effort.
- Communication strategies – lines of communication and reporting structure within Proponent team and with PWGSC and General Contractor.
- Project Response Time - demonstrate how the response time requirements will be met



## 4.3 EVALUATION AND RATING

### 4.3.1 Technical Rating

Phase Two proposals that are responsive (i.e. which meet all the mandatory requirements set out in the RFP) will be reviewed, evaluated and rated by a PWGSC Evaluation Board.

	Criterion	Weight Factor	Rating	Weighted Rating
4.2.1	Understanding of the Project	3.0	0 - 10	0 - 30
4.2.2	Design Philosophy / Approach / Methodology	2.0	0 - 10	0 - 20
4.2.3	Scope of Services	2.0	0 - 10	0 - 20
4.2.4	Management of Services	3.0	0 - 10	0 - 30
	<b>Phase Two Technical Rating</b>	<b>10.0</b>		<b>0 - 100</b>

### Generic Evaluation Table

PWGSC Evaluation Board members will evaluate the strengths and weaknesses of the Proponent's response to the evaluation criteria and will rate each criterion with even numbers (0, 2, 4, 6, 8 or 10) using the generic evaluation table found in the above section 3.3 Evaluation and Rating.

### Combined Technical Rating

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

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

To be considered further, proponents **must** achieve a minimum Combined Technical Score of fifty-four (54) points out of the ninety (90) points available as specified above.

**No further consideration will be given to proponents not achieving the pass mark of fifty-four (54) points.**

## SRE 5 PRICE OF SERVICES

1. To be declared responsive, a bid must:

- a. Comply with all the requirements of the bid solicitation;
- b. Meet all mandatory criteria; and

- c. Obtain a minimum Combined Technical Score of fifty-four (54) points out of the ninety (90) points.
2. Bids not meeting (a), (b) and (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 90% for the technical merit and 10% for the price.
4. The Combined Technical Score will be determined as described above.
5. To establish the Price Score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 10% as illustrated in the example below.
6. All price proposals which are greater than 35 percent above the average price will cause their respective complete proposals to be set aside and receive no further consideration.
7. For each responsive bid, the Combined Technical Score and the Price Score will be added to determine its Total Score.
8. The Proponent receiving the highest Total Score is the first entity that the Evaluation Board will recommend for the provision of the required services. In the case of a tie, the proponent submitting the lower price for the services will be selected.

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

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

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**PROJECT BRIEF**

**(see attachment)**