Public Works and Government Services Canada / Travaux publics et Services gouvernementaux Canada

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:

Public Works and Government Services Canada
Canada Place/Place du Canada
10th Floor/10e étage
9700 Jasper Ave/9700 ave Jasper
Edmonton
Alberta
T5J 4C3
Bid Fax: (780) 497-3510

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

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

Issuing Office - Bureau de distribution

Public Works and Government Services Canada
Canada Place / Place du Canada
10th Floor /10e étage
9700 Jasper Ave / 9700 ave Jasper
Edmonton
Alberta
T5J 4C3

Title - Sujet
Consultant Services - Functional Pr

Solicitation No. - N° de l'invitation	**Date**
EW038-211184/A	2020-10-05

Client Reference No. - N° de référence du client
ISC-EW038-211184

GETS Reference No. - N° de référence de SEAG
PW-$PWU-201-11911

File No. - N° de dossier	**CCC No./N° CCC - FMS No./N° VME**
PWU-0-43118 (201)	

Solicitation Closes - L'invitation prend fin
at - à 02:00 PM
on - le 2020-11-03

Time Zone / Fuseau horaire
Mountain Daylight Saving Time MDT

F.O.B. - F.A.B.
Plant-Usine: ☐ **Destination:** ☐ **Other-Autre:** ☐

Address Enquiries to: - Adresser toutes questions à:	**Buyer Id - Id de l'acheteur**
Ho (RPC), Hector	pwu201

Telephone No. - N° de téléphone	**FAX No. - N° de FAX**
(780) 901-0989 ( )	(780) 497-3510

Destination - of Goods, Services, and Construction:
Destination - des biens, services et construction:
INDIGENOUS SERVICES CANADA
9700 JASPER AVENUE NW
EDMONTON
Alberta
T5J4C3
Canada

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée	**Delivery Offered - Livraison proposée**
See Herein	

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

Telephone No. - N° de téléphone
Facsimile No. - N° de télécopieur

Name and title of person authorized to sign on behalf of Vendor/Firm (type or print)
Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)

Signature **Date**

Canada

THIS PROCUREMENT CONTAINS A SECURITY REQUIREMENT
REQUEST FOR PROPOSAL (RFP)

TABLE OF CONTENTS

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

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. This is a single phase selection process. The nature of the requirement and the anticipated limited number of response by the industry leads PWGSC to believe that this approach will not unduly force a large number of firms to expend an overall unreasonable amount of effort in response to PWGSC.

3. Proponents responding to this RFP are requested to submit a full and complete proposal. The proposal will cover not only the qualifications, experience and organization of the proposed Consultant Team, but also the detailed approach to the work, and the pricing and terms offered. A combination of the technical and price of services submissions will constitute the proposal.

4. This bid solicitation allows and encourages proponents to use the epost Connect service provided by Canada Post Corporation to transmit their proposals electronically.

   Due to the nature of the bid solicitation, transmission of proposals by facsimile is not recommended for administrative reasons but offered to proponents to provide an alternative opportunity in case of incompatibility or inability to transmit by epost Connect service.

   Proponents must refer to GI16 Submission of proposal, and SRE 2 Proposal Requirements, of the bid solicitation, for further information.

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);
   General instructions (GI) – Architectural and/or Engineering services – Request for Proposal;
   Submission Requirements and Evaluation (SRE);

   (b) the general terms, conditions and clauses, as amended, identified in the Agreement clause;

   (c) 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 proposals; and

(g) the proposal, Declaration/Certifications Form 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 solicitation period must be submitted in writing to the Contracting Authority named on the RFP - Page 1 at e-mail address hector.ho@pwgsc-tpsgc.gc.ca as early as possible. Enquiries should be received no later than 7 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 World Trade Organization - Agreement on Government Procurement (WTO-AGP) and the Canada-European Union Comprehensive Economic and Trade Agreement (CETA).

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 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.

SI6 SECURITY REQUIREMENT

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

(a) the Proponent must hold a valid organization security clearance as indicated in Supplementary Conditions SC1;

(b) the Proponent's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Supplementary Conditions SC1;

(c) the Proponent must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.;

SI7 WORKERS COMPENSATION

1. **The recommended Proponent shall provide to the Contracting Authority, prior to Contract award:**

   a) a Workers Compensation Board letter of good standing, also listing covered Directors, Principals, Proprietor(s) or Partners who will be or who are anticipated to be present on the work site(s).

2. The recommended Proponent shall deliver all of the above documents to the Contracting Authority on or before the date stated (usually 3-5 days after notification) by the Contracting Authority. Failure to comply with the request may result in the proposal being declared non-compliant.

SI8 - WEBSITES

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

Employment Equity Act
http://laws-lois.justice.gc.ca/eng/acts/E-5.401/index.html

Federal Contractors Program (FCP)
https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html

Certificate of Commitment to Implement Employment Equity form LAB 1168
http://www.servicecanada.gc.ca/cgi-bin/search/eforms/index.cgi?app=profile&form=lab1168&dept=sc&lang=e

Ineligibility and Suspension Policy
http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html

Code of Conduct for Procurement
http://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/contexte-context-eng.html

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

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

GENERAL INSTRUCTIONS (GI) – ARCHITECTURAL AND/OR ENGINEERING SERVICES – REQUEST FOR PROPOSAL

GI1 Integrity provisions—proposal

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

declaration, Canada may terminate the Contract for default. Pursuant to the Policy, Canada may also determine the Proponent to be ineligible for award of a contract for providing a false or misleading certification or declaration.

GI2 Definitions

In this Request for Proposal (RFP), the following words or phrases have the corresponding meaning.

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

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

"Key Personnel":
Staff of the Proponent, subconsultants and specialists proposed to be assigned to this project.

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

"Proponent":
The person or entity (or, in the case of a joint venture, the persons or entities) which submits a proposal. It does not include the parent, subsidiaries or other affiliates of the Proponent, or its sub-consultants.

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

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

GI3 Overview of selection procedure

The following is an overview of the selection procedure.

3.1 Proposal

1. Proponents submit the "technical" component of their proposal in one section and the proposed price of the services (price proposal) in a second section in accordance with the instructions contained in the proposal documents.
2. The information that Proponents are required to provide is set out in detail elsewhere in the RFP.
3. In response to the RFP, interested Proponents submit a proposal in which they:
    a. indicate whether the proposal is submitted by an individual firm or by a joint venture;
    b. if the proposal is submitted by a joint venture, describe the proposed legal and working relationships of the joint venture and the benefits to be gained by the formation of the joint venture;
    c. identify the prime consultants and key sub consultants and specialists proposed for inclusion in the Consultant Team, and the proposed organizational structure of the Team;
    d. describe the extent to which proposed members of the Consultant Team have successfully performed services for projects comparable to the project which is the subject of the proposal;

e. identify the professional accreditation, experience, expertise and competence of the Consultant Team and Key Personnel proposed to be assigned to perform the required services.
f. comply with all other requirements set out in the RFP.

3.2 Proposal evaluation and rating

1. Technical components of all responsive proposals are reviewed, evaluated and rated by a Public Works and Government Services Canada (PWGSC) Evaluation Board in accordance with the criteria, components and weight factors set out in the RFP. Upon completion of the evaluation, Technical Ratings are established.
2. Proposals achieving the minimum Technical Score specified in the Submission Requirements and Evaluation section of the RFP are further considered.
3. The price proposals of all responsive proposals are considered upon completion of the technical evaluation. When there are three or more responsive proposals, an average price is determined by adding all the price proposals together and dividing the total by the number of price proposals opened. This calculation will not be conducted when one or two responsive proposals are received.
4. All price proposals which are greater than 25 percent above the average price will cause their respective complete proposals to be set aside and receive no further consideration.
5. The remaining price proposals are rated as follows:
    a. The lowest price proposal receives a Price Rating of 100.
    b. The second, third, fourth and fifth lowest prices receive Price Ratings of 80, 60, 40, and 20 respectively. All other price proposals receive a Price Rating of 0.
    c. On the rare occasion where two (or more) price proposals are identical, these price proposals receive the same rating and the corresponding number of following ratings are skipped.
    d. The Price Rating is multiplied by a predetermined percentage factor to establish a Price Score.
6. A price proposal in excess of any maximum funding limit, when this limit has been set in the Supplementary Instructions to Proponents, may result in disqualification of the complete proposal.

3.3 Total score

1. The total overall score (Total Score) assigned to each Proponent's complete proposal is calculated as the aggregate of:
    a. the Technical Score, and
    b. the Price Score.
2. The Proponent receiving the highest Total Score is the first entity that the PWGSC Evaluation Board will recommend for the provision of the required services.

3.4 Notification

PWGSC normally expects to advise in writing unsuccessful Proponents within one week after PWGSC has entered into a contractual arrangement with the successful Proponent.

GI4 Procurement Business Number

Proponents are required to have a Procurement Business Number (PBN) before contract award. Proponents may register for a PBN online at *Supplier Registration Information (https://srisupplier.contractscanada.gc.ca/index-eng.cfm?af=ZnVzZWFjdGlvbj1yZWdpc3Rlci5pbnRybyZpZD0y&lang=eng)*. For non-Internet registration, Proponents may contact the InfoLine at 1-800-811-1148 to obtain the telephone number of the nearest Supplier Registration Agent.

GI5 Responsive proposals

To be considered responsive, a proposal must meet all of the mandatory requirements set out in the RFP. No further consideration in the selection procedure will be given to a Proponent submitting a non-responsive proposal.

GI6 Completion of submission

The Proponent shall base the proposal on the applicable proposal documents listed in the Supplementary Instructions to Proponents.

GI7 Proposal price

Unless specified otherwise elsewhere in the proposal documents:

a. the price proposal shall be in Canadian currency, and
b. the price proposal shall not include any amount for Applicable Taxes, and
c. the requirement does not offer exchange rate fluctuation risk mitigation. Requests for exchange rate fluctuation risk mitigation will not be considered. All proposals including such provision will render the proposal non-responsive.

GI8 Communications—solicitation period

To ensure the integrity of the competitive bid process, enquiries and other communications regarding the RFP must be directed only to the Contracting Authority identified in the RFP. Failure to comply with this requirement may result in the proposal being declared non-responsive.

To ensure consistency and quality of information provided to proponents, significant enquiries received and their replies will be posted on the Government Electronic Tendering Service (GETS).

GI9 Limitation of submissions

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

5. Any joint venture entered into for the provision of professional services or other services must be in full compliance with the requirements of any provincial or territorial law pertaining thereto in the Province or Territory in which the project is located.

GI10 Licensing requirements

1. Consultant Team members and Key Personnel shall be, or be eligible to be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial or territorial law in the Province or Territory in which the project is located.
2. By virtue of submission of a proposal, the Proponent certifies that the Proponent's Consultant Team and Key Personnel are in compliance with the requirements of subsection 1 above. The Proponent acknowledges that PWGSC reserves the right to verify any information in this regard and that false or erroneous certification may result in the proposal being declared non-responsive.

GI11 Rejection of proposal

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

GI12 Not applicable

Not applicable

GI13 Insurance requirements

The successful Proponent shall be required to obtain and maintain Professional Liability and Commercial General Liability insurance coverage in accordance with the requirements set out elsewhere in the proposal documents.

GI14 Joint venture

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

GI15 Composition of Consultant Team

By submitting a proposal, the Proponent represents and warrants that the entities and persons proposed in the proposal to perform the required services will be the entities and persons that will perform the services in the fulfillment of the project under any contractual arrangement arising from submission of the proposal. If the Proponent has proposed any person in fulfillment of the project who is not an employee of the Proponent, the Proponent warrants that it has written permission from such person (or the employer of such person) to propose the services of such person in relation to the services to be performed.

GI16 Submission of proposal

GI16.1 Submission of proposal

1. Canada requires that each proposal, at solicitation closing date and time or upon request from the Contracting Authority, be signed by the Proponent or by an authorized representative of the Proponent. If a proposal is submitted by a joint venture, it must be in accordance with section GI14.
2. It is the Proponent's responsibility to:
    a. submit a proposal, duly completed, in the format requested, on or before the solicitation closing date and time set;

b. send its proposal only to the Bid Receiving Unit of Public Works and Government Services Canada (PWGSC) specified below, by the date and time indicated on page 1 of the bid solicitation.

   In the case of submission of a hard copy proposal, send its proposal only to:

   Bid Receiving Public Works and Government Services Canada
   Canada Place, Suite 1000
   9700 Jasper Avenue
   Edmonton AB, T5J 4C3

   In the case of submission by epost Connect, see instructions in GI16.2.1 below.
   In the case of submission by Facsimile, see instructions in GI16.2.2 below.

c. obtain clarification of the requirements contained in the RFP, if necessary, before submitting a proposal;
d. ensure that the Proponent's name, return address, the solicitation number and description, and solicitation closing date and time are clearly visible on the envelope or the parcel(s) containing the proposal; and
e. provide a comprehensive and sufficiently detailed proposal that will permit a complete evaluation in accordance with the criteria set out in this RFP.

3. The technical and price components of the proposal must be submitted in separate sections in accordance with the instructions contained in the proposal documents.
4. Timely and correct delivery of proposals to the office designated for receipt of proposals is the sole responsibility of the Proponent. PWGSC will not assume or have transferred to it those responsibilities. All risks and consequences of incorrect delivery of proposals are the responsibility of the Proponent.
5. Proposals and supporting information may be submitted in either English or French.
6. Canada will make available Notices of Proposed Procurement (NPP), bid solicitations and related documents for download through the Government Electronic Tendering Service (GETS). Canada is not responsible and will not assume any liabilities whatsoever for the information found on websites of third parties. In the event an NPP, bid solicitation or related documentation would be amended, Canada will not be sending notifications. Canada will post all amendments using GETS. It is the sole responsibility of the Proponent to regularly consult GETS for the most up-to-date information. Canada will not be liable for any oversight on the Proponent's part nor for notification services offered by a third party.

GI16.2 Transmission by epost Connect or facsimile

1. **epost Connect**

   a. Proposals may be submitted by using the epost Connect service provided by Canada Post Corporation (https://www.canadapost.ca/web/en/products/details.page?article=epost_connect_send_a):

   The only acceptable email address to use with epost Connect for responses to this bid solicitation issued by PWGSC regional offices is:

   ROReceptionSoumissions.WRBidReceiving@tpsgc-pwgsc.gc.ca

   Note: Proposals will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in b., or to send proposals through an epost Connect message if the proponent is using its own licensing agreement for epost Connect.

b. To submit a proposal using epost Connect service, the Proponent must either:
   i. send directly its proposal only to the specified PWGSC Bid Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or
   ii. send as early as possible, and in any case, at least six business days prior to the solicitation closing date and time (in order to ensure a response), an email that includes the bid solicitation number to the specified PWGSC Bid Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.
c. If the Proponent sends an email requesting epost Connect service to the specified Bid Receiving Unit in the bid solicitation, an officer of the Bid Receiving Unit will then initiate an epost Connect conversation. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Proponent to access and action the message within the epost Connect conversation. The Proponent will then be able to transmit its proposal afterward at any time prior to the solicitation closing date and time.
d. If the Proponent is using its own licensing agreement to send its proposal, the Proponent must keep the epost Connect conversation open until at least 30 business days after the solicitation closing date and time.
e. The bid solicitation number should be identified in the epost Connect message field of all electronic transfers.
f. It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a Proponent not have a Canadian address, they may use the Bid Receiving Unit address specified in the solicitation in order to register for the epost Connect service.
g. For proposals transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the proposal including, but not limited to, the following:
   i. receipt of a garbled, corrupted or incomplete proposal;
   ii. availability or condition of the epost Connect service;
   iii. incompatibility between the sending and receiving equipment;
   iv. delay in transmission or receipt of the proposal;
   v. failure of the Proponent to properly identify the proposal;
   vi. illegibility of the proposal;
   vii. security of proposal data; or
   viii. inability to create an electronic conversation through the epost Connect service.
h. The Bid Receiving Unit will send an acknowledgement of the receipt of proposal document(s) via the epost Connect conversation, regardless of whether the conversation was initiated by the supplier using its own license or the Bid Receiving Unit. This acknowledgement will confirm only the receipt of proposal document(s) and will not confirm if the attachments may be opened nor if the content is readable.
i. Proponents must ensure that they are using the correct email address for the Bid Receiving Unit when initiating a conversation in epost Connect or communicating with the Bid Receiving Unit and should not rely on the accuracy of copying and pasting the email address into the epost Connect system.
j. A proposal transmitted by epost Connect service constitutes the formal proposal of the Proponent and must be submitted in accordance with section GI16.1.

2. **Facsimile**

    a. Proposals may be submitted by facsimile.

    The only acceptable facsimile number for responses to bid solicitations issued by this PWGSC regional office is:

    Bid Fax: (780) 497-3510

    b. For proposals transmitted by facsimile, Canada will not be responsible for any failure attributable to the transmission or receipt of the faxed proposal including, but not limited to, the following:
        i. receipt of garbled, corrupted or incomplete proposal;
        ii. availability or condition of the receiving facsimile equipment;
        iii. incompatibility between the sending and receiving equipment;
        iv. delay in transmission or receipt of the proposal;
        v. failure of the Proponent to properly identify the proposal;
        vi. illegibility of the proposal; or
        vii. security of proposal data.

    c. A proposal transmitted by facsimile constitutes the formal proposal of the Proponent and must be submitted in accordance with section GI16.1.

GI17 Late submissions

1. PWGSC will return or delete proposals delivered after the stipulated solicitation closing date and time, unless they qualify as a delayed proposal as described in GI17.2. For late proposals submitted using means other than the Canada Post Corporation's epost Connect service, the physical proposal will be returned. For proposals submitted electronically, the late proposal will be deleted. As an example, proposals submitted using Canada Post Corporation's epost Connect service, conversations initiated by the Bid Receiving Unit via the epost Connect service pertaining to a late proposal, will be deleted. Records will be kept documenting the transaction history of all late proposals submitted using epost Connect.
2. A proposal delivered to the specified bid receiving unit after the solicitation closing date and time but before the contract award date may be considered, provided the proponent can prove the delay is due solely to a delay in delivery that can be attributed to the Canada Post Corporation (CPC) (or national equivalent of a foreign country). Private courier (Purolator Inc., Fedex Inc., etc.) is not considered to be part of CPC for the purposes of delayed proposals.

    a. The only pieces of evidence relating to a delay in the CPC system that are acceptable to PWGSC are:

        i. a CPC cancellation date stamp;
        ii. a CPC Priority Courier bill of lading;
        iii. a CPC Xpresspost label;

    that clearly indicates that the proposal was sent the day before the solicitation closing date.

    b. The only pieces of evidence relating to a delay in the epost Connect service provided by CPC system that are acceptable to PWGSC is a CPC epost Connect service date and time record indicated in the epost Connect conversation history that clearly indicates that the proposal was sent before the solicitation closing date and time.

3. Misrouting, traffic volume, weather disturbances, labour disputes or any other causes for the late delivery of proposals are not acceptable reasons for the proposal to be accepted by PWGSC.
4. Postage meter imprints, whether imprinted by the Proponent, the CPC or the postal authority outside Canada, are not acceptable as proof of timely mailing.

GI18 Not applicable

GI19 Acceptance of proposal

1. Canada may accept any proposal, or may reject any or all proposals.
2. In the case of error in the extension or addition of unit prices, the unit price will govern.
3. While Canada may enter into an agreement or contractual arrangement without prior negotiation, Canada reserves the right to negotiate with Proponents on any procurement.
4. Canada reserves the right to cancel or amend the RFP at any time.

GI20 Legal capacity

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

GI21 Debriefing

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

GI22 Financial capability

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

Statement), as of two months before the date on which the Contracting Authority requests this information.

c. If the Proponent has not been in business for at least one full fiscal year, the following must be provided:
   i. the opening Balance Sheet on commencement of business (in the case of a corporation, the date of incorporation); and
   ii. the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement) as of two months before the date on which the Contracting Authority requests this information.

d. A certification from the Chief Financial Officer or an authorized signing officer of the Proponent that the financial information provided is complete and accurate.

e. A confirmation letter from all of the financial institution(s) that have provided short-term financing to the Proponent outlining the total of lines of credit granted to the Proponent and the amount of credit that remains available and not drawn upon as of one month prior to the date on which the Contracting Authority requests this information.

f. A detailed monthly Cash Flow Statement covering all the Proponent's activities (including the requirement) for the first two years of the requirement that is the subject of the bid solicitation, unless this is prohibited by legislation. This statement must detail the Proponent's major sources and amounts of cash and the major items of cash expenditures on a monthly basis, for all the Proponent's activities. All assumptions made should be explained as well as details of how cash shortfalls will be financed.

g. A detailed monthly Project Cash Flow Statement covering the first two years of the requirement that is the subject of the bid solicitation, unless this is prohibited by legislation. This statement must detail the Proponent's major sources and amounts of cash and the major items of cash expenditures, for the requirement, on a monthly basis. All assumptions made should be explained as well as details of how cash shortfalls will be financed.

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

   It is the Proponent's responsibility to confirm with the Contracting Authority that this information is still on file with PWGSC.

5. Other Information: Canada reserves the right to request from the Proponent any other information that Canada requires to conduct a complete financial capability assessment of the Proponent.
6. Confidentiality: If the Proponent provides the information required above to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as permitted by the *Access to Information Act (https://laws-lois.justice.gc.ca/eng/acts/A-1/)*, R.S.., 1985, c. A-1, section 20(1) (b) and (c).

7. Security: In determining the Proponent's financial capability to fulfill this requirement, Canada may consider any security the Proponent is capable of providing, at the Proponent's sole expense (for example, an irrevocable letter of credit from a registered financial institution drawn in favour of Canada, a performance guarantee from a third party or some other form of security, as determined by Canada).
8. In the event that a proposal is found to be non-compliant on the basis that the Proponent is considered not to be financially capable of performing the subject requirement, official notification shall be provided to the Proponent.

GI23 Performance evaluation

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

GI24 Proposal costs

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

GI25 Conflict of interest—unfair advantage

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

GI26 Limitation of liability

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

GI27 Code of Conduct for Procurement—proposal

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

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
   Supplementary Conditions
   Agreement Particulars
   (c) 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 incorporated in the Agreement before the date of the Agreement;
   (g) the proposal, the Declaration/Certifications Form and the 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) Terms of Reference;
(h) the document entitled “Doing Business with PWGSC Documentation and Deliverables Manual”;
(i) the document entitled “Security Requirement Check List”;
(j) the proposal.

SUPPLEMENTARY CONDITIONS (SC)

SC1 SECURITY REQUIREMENT

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

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER:
PWGSC FILE No. R107448

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 Contract Security Program (CSP), Public Works and Government ServicesCanada (PWGSC).

2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the CSP, **PWGSC.**

3. The Contractor/Offeror MUST NOT remove any PROTECTED information or assets from the identified site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.

4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of the CSP, **PWGSC.**

5. The Contractor/Offeror must comply with the provisions of the:

   a) Security Requirements Check List and security guide (if applicable), attached at Annex E;

   b) Industrial Security Manual (Latest Edition).

SC2 EMPLOYER/PRIME CONSULTANT:

1. During the Design Stage

   a) The Consultant shall, where the Consultant is working on Federal property and is in control of the work site (no Federal presence or construction contractor), for the purposes of the applicable provincial or territorial Occupational Health & Safety Acts and Regulations, and for the duration of the Work of the Contract**:**

      i) act as the Employer, where the Consultant is the only employer on the work site, in accordance with the Authority Having Jurisdiction;

      ii) assume the role of Prime Consultant, where there are two or more employers (including sub-consultants) involved in work at the same time and space at the work site, in accordance with the Authority Having Jurisdiction; and

2. During the Construction Stage

    a) The Consultant shall, for the purposes of the Occupational Health & Safety Acts and Regulations, and for the duration of the Work of the Contract, agree to accept that the Construction Contractor is the Principal/Prime Contractor, and to conform to that Contractor's Site Specific Health and Safety Plan.

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.

SUBMISSION REQUIREMENTS AND

EVALUATION

SUBMISSION REQUIREMENTS AND EVALUATION

SRE 1 GENERAL INFORMATION

1.1 Reference to the Selection Procedure

An 'Overview of the selection procedure' can be found in General instructions 3 (GI3), Overview of selection procedure.

1.2 Calculation of Total Score

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

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

SRE 2 PROPOSAL REQUIREMENTS

2.1 Proposal via Epost Connect service

This bid solicitation allows and encourages proponents to use the epost Connect service provided by Canada Post Corporation to transmit their proposal electronically.

If the Proponent chooses to submit its proposal electronically through epost Connect service, Canada requests that the Proponent submits its proposal in accordance with section GI16, Submission of proposal, of the General Instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.

Canada requests that the proposal be gathered per separate electronic document (attachment) as follows:
Section I: Technical Proposal;
Section II: Price Proposal.

The electronic attachment should be labelled with the name of the section and the Solicitation Number.

If the Proponent is simultaneously providing copies of its proposal using multiple acceptable delivery methods, and if there is a discrepancy between the wording of any of these copies and the electronic copy provided through epost Connect service, the wording of the electronic copy provided through epost Connect service will take precedence over the wording of the other copies.

2.2 Proposal in Hard Copies

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

Section I: Technical Proposal (submit one (1) bound original plus one (1) electronic copy on a data storage device of the proposal)
Section II: Price Proposal (submit one (1) bound original) in a separate sealed envelope.)

Double-sided submissions are preferred.

2.3 Proposal by Facsimile

Due to the nature of the bid solicitation, proposals transmitted by facsimile is not recommended for administrative reasons but offered to proponents to provide an alternative opportunity in case of incompatibility or inability to transmit by epost Connect service.

If the Proponent submits its proposal by facsimile, Canada requests that the following sections be clearly identified and separated in the proposal:

Section I: Technical Proposal
Section II: Price Proposal

2.4 Requirement for Proposal Format

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

- Paper (or page) 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
- 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") papers (or pages) 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

2.5 Specific Requirements for Proposal Format

The maximum number of pages (including text and graphics) to be submitted for the Rated Requirements under SRE 3.2 is **twenty five (25) pages.**

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

- Covering letter
- Cover page
- Tab/Dividers used to solely identify the sections of the proposal, provided they are free of all other text and/or graphics
- Table of Contents
- Consultant Team Identification (Appendix A)
- Declaration/Certifications Form (Appendix B)
- Integrity Provisions – Required Documentation
- 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 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 a(n) Architect or Interior Designer, licensed, or eligible to be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial in the province of Alberta

3.1.2 Consultant Team Identification

The consultant team to be identified must include the following:

Proponent (prime consultant) - Architect or Interior Designer
Key Sub-consultants / Specialists - Functional Program Consultant, Change Management Consultant, Costing Consultant

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 General instructions 9 (GI9) Limitation of submissions).

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

3.1.3 Declaration/Certifications Form

Proponents must complete, sign and submit the following:

- Appendix B, Declaration/Certifications Form as required.

3.1.4 Integrity Provisions – Required documentation

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

3.2 RATED REQUIREMENTS

3.2.1 Achievements of Proponent on Projects

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

Select a **maximum** of 3 projects undertaken within the last 6 years. Joint venture submissions are not to exceed the maximum number of projects. Only the first 3 projects listed in sequence will receive consideration and any others will receive none as though not included.

Information that should be supplied:

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

The Proponent (as defined in General instructions 2 (GI2) Definitions) must possess the knowledge on the above projects. Past project experience from entities other than the Proponent will not be considered in the evaluation unless these entities form part of a joint venture Proponent.

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

3.2.2 Achievements of Key Sub-consultants and Specialists on Projects

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

Select a **maximum** of 3 projects undertaken within the last 6 years per key sub consultant or specialist. Only the first 3 projects listed in sequence (per key subconsultant or specialist) will receive consideration and any others will receive none as though not included.

Information that should be supplied:

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

3.2.3 Achievements of Key Personnel on Projects

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

Information that should be supplied for each key personnel:

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

3.2.4 Understanding of the Project:

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

Information that should be supplied:

- The functional and technical requirements
- Broader goals (federal image, sustainable development, sensitivities)
- The relationship between this commission and any earlier studies completed for PWGSC
- Significant issues, challenges and constraints
- Project schedule and cost. Review schedule and cost information and assess risk management elements that may affect the project
- The Client User's philosophies and values
- Conflict resolution methodology

3.2.5 Scope of Services:

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

Information that should be supplied:

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

3.2.6 Management of Services:

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

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

Information that should be supplied:

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

3.2.7 Design Philosophy / Approach / Methodology

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

Information that should be supplied:

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

3.3 EVALUATION AND RATING

Only the technical components of the proposals which are responsive will be reviewed, evaluated and rated by a PWGSC Evaluation Board in accordance with the following to establish Technical Ratings:

Criterion	Weight Factor	Rating	Weighted Rating
Achievements of Proponent	2.0	0 - 10	0 - 20
Achievements of Key Sub-consultants / Specialists	1.0	0 - 10	0 - 10
Achievements of Key Personnel on Projects	2.0	0 - 10	0 - 20
Understanding of the Project	1.5	0 - 10	0 - 15
Scope of Services	1.0	0 - 10	0 - 10
Management of Services	1.0	0 - 10	0 - 10
Design Philosophy / Approach / Methodology	1.5	0 - 10	0 - 15
Technical Rating	10.0		0 - 100

Generic Evaluation Table

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

	INADEQUATE	WEAK	ADEQUATE	FULLY	STRONG

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

To be considered further, proponents **must** achieve a minimum Technical Rating of sixty (60) points out of the hundred (100) points available as specified above.

No further consideration will be given to proponents not achieving the pass mark of sixty (60) points.

SRE 4 PRICE OF SERVICES

All price proposals corresponding to responsive proposals which have achieved the pass mark of sixty (60) points will be considered upon completion of the technical evaluation. When there are three or more responsive proposals, an average price is determined by adding all the price proposals together and dividing the total by the number of price proposals being opened. This calculation will not be conducted when one or two responsive proposals are received.

All price proposals which are greater than twenty-five percent (25%) above the average price will be set aside and receive no further consideration.

The remaining price proposals are rated as follows:

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

B. The second, third, fourth and fifth lowest prices receive Price Ratings of 80, 60, 40, and 20 respectively. All other price proposals receive a Price Rating of 0.

C. On the rare occasions where two (or more) price proposals are identical, the matching price proposals receive the same rating and the corresponding number of following ratings are skipped.

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

SRE 5 TOTAL SCORE

Total Scores will be established in accordance with the following:

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

The 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.

SRE 6 SUBMISSION REQUIREMENTS - CHECKLIST

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

Please follow detailed instructions in General instructions 16 (GI16) Submission of proposal. Proponents may choose to introduce their submissions with a cover letter.

- ☐ Team Identification - see typical format in Appendix A
- ☐ Declaration/Certifications Form - completed and signed - form provided in Appendix B

- Integrity Provisions – Required documentation – **as applicable** in accordance with the Ineligibility and Suspension Policy (http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) and as per General instructions 1 (GI1), Integrity Provisions – Proposal, **section 3a.**
- Integrity Provisions - Declaration of Convicted Offences – **with its bid, as applicable** in accordance with the Ineligibility and Suspension Policy (http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) and as per General instructions 1 (GI1), Integrity Provisions – Proposal, **section 3b.**
- Proposal
- Front page of RFP
- Front page(s) of any solicitation amendment
- Price Proposal Form completed and submitted in a separate section.

For hard copy Proposal:

- Proposal - one (1) original plus one (1) electronic copy on a data storage device of the proposal)
- Price Proposal Form – only one (1) Price proposal Form completed and submitted in a separate envelope

For epost Connect Proposal:

- Proposal - one (1) electronic document attached to the message
- Price Proposal Form – one (1) Price proposal Form completed and submitted in a separate electronic document attached to the message

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 or Interior Designer):

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

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

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

II. Key Sub Consultants / Specialists:

Functional Program Consultant
Firm Name: ....
....
....

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

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

Change Management Consultant
Firm Name: ....
....
....

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

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

Costing Consultant

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

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

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

APPENDIX B - DECLARATION/CERTIFICATIONS FORM

Project Title:

Name of Proponent:

Street Address:

Mailing Address:

Telephone Number: ( )

Fax Number: ( )

E-Mail:

Procurement Business Number:

Type of Organization:	**Size of Organization:**
_____ Sole Proprietorship	Number of Employees ______
_____ Partnership	Graduate Architects / Professional Engineers ______
_____ Corporation	Other Professionals ______
_____ Joint Venture	Technical Support ______
	Other ______

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.

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: 2019-01 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.

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 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.

APPENDIX C - PRICE PROPOSAL FORM

INSTRUCTIONS:

-Complete this Price Proposal Form and submit in accordance with the instructions in this solicitation.
-Price Proposals are not to include Applicable Taxes.
-PROPONENTS SHALL NOT ALTER THIS FORM

Project Title:

Name of Proponent:

The following will form part of the evaluation process:

REQUIRED SERVICES

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

SERVICES	FIXED FEE
Visioning Services	$.................
Information Gathering Services	$.................
Focus Group Services	$.................
Furniture Support Services	$.................
Survey Services	$.................
Test Site Services	$.................
Town Hall Sessions	$.................
Functional Program Services	$.................
MAXIMUM FIXED FEES	**$.................**

TOTAL FEE FOR REQUIRED SERVICES **$.........................**

APPENDIX C - PRICE PROPOSAL FORM (CONT'D)

THE FOLLOWING HOURLY RATES MAY BE USED FOR FUTURE CONTRACT AMENDMENTS

Principals

Name	$ per hour
....	$............................
....	$ ....
....	$ ....
....	$ ....
....	$............................
....	$ ....
....	$ ....
....	$ ....
....	$............................
....	$ ....
....	$ ....
....	$ ....
....	$............................
....	$ ....
....	$ ....
....	$ ....
....	$............................

APPENDIX C - PRICE PROPOSAL FORM (CONT'D)

Staff

Name / Position	$ per hour
....	....
....	....
....	....
....	....
....	....
....	....
....	....
....	....
....	....
....	....
....	....
....	....
....	....
....	....
....	....
....	....
....	....
....	....
....	....

END OF PRICE PROPOSAL FORM

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

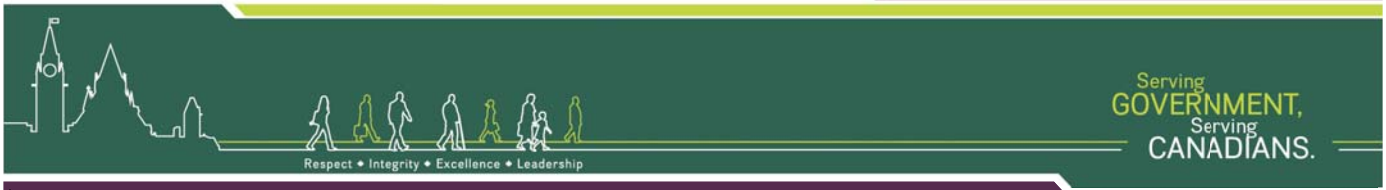
See attached document

Security Requirements Check List (Appendix E)

See attached document

Public Services and Procurement Canada | Services publics et Approvisionnement Canada

Canada



Doing Business with PWGSC

Documentation and Deliverables Manual

www.pspc-spac.gc.ca

Contents

Revisions

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

1 General

1.1 Effective Date

January 12, 2018

1.2 Authority

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

1.3 Purpose

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

1.4 Scope

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

1.5 Harmonization with Terms of Reference

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

1.6 Departmental Name Change

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

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

1.7 Terminology

This document utilizes the following terminology:

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

1.8 Definitions

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

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

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

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

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

2 Construction Documents

2.1 General

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

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

2.1.1 Principles of PWGSC Contract Documents

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

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

2.1.2 Translation

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

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

2.1.3 Construction Documents Definitions

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

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

2.1.4 Quality Assurance

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

2.1.5 Quality Assurance Deliverables

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

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

2.1.6 Terminology & Quantities

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

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

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

2.1.7 Units of Measure

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

2.2 Drawings

2.2.1 General

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

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

2.2.2 Information to be Included

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

2.2.3 Title Blocks and Revision Notes

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

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

2.2.4 Drawing Numbers

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

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

2.2.5 Presentation Requirements

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

2.2.6 Legends

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

2.2.7 Schedules and Tables

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

2.2.8 North Arrow

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

2.2.9 Drawing Symbols

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

2.2.10 As-Built Drawings

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

2.2.11 Submission Format

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

2.2.11.1 Drawing Hard Copy Deliverable Format

Drawing submitted in hard copy shall be:

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

2.2.11.2 Drawing Electronic Copy Deliverable Format

Drawing submitted electronically shall be provided:

- without password protection or printing restrictions;
- in two formats:
    - o PDF/E-1 (in compliance with ISO 24517-1);
    - o .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 to 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 G*uide and *NMS Development Guide* issued by the National Research Council for further guidance on using the NMS.

2.4.2 Index

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

2.4.3 Specification Organization

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

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

2.4.4 Standards

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

2.4.5 Specifying Materials

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

2.4.5.1 Alternate Products and Materials

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

2.4.5.2 Sole Sourcing

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

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

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

Designated Contractor

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

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

Designated Contractor

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

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

Materials

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

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

Acceptable Materials

.1 The only acceptable materials are [_____].

2.4.6 Measurement for Payment

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

2.4.6.1 Unit Prices

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

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

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

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

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

2.4.7 Cash Allowances

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

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

2.4.8 Warranties

The 12-month warranty period specified in PWGSC’s standard acquisition clauses and conditions with regard to the contract should typically be retained as is. Extended warranties should only be used where experience has shown that serious defects are likely to appear after expiry of the standard one-year warranty period. When necessary to extend beyond the 12 month warranty period, use the following wording in Part 1 of the applicable technical sections, under the heading “Extended Warranty”:

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

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

> For [_____], the 12 month warranty period is extended to [______] months.

2.4.9 Miscellaneous Requirements

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

2.4.10 Specification Coordination

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

2.4.11 Regional Guide

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

2.4.12 Health and Safety

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

2.4.13 Subsurface Investigation Reports

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

> Subsurface Investigation Report(s)
>
> .1 Subsurface investigation report(s) are included in the specification following this section.
>
> If the Departmental Representative determines that it is not practical to include the subsurface investigation report(s), alternate instructions will be provided.
>
> Where tender documents are to be issued in both official languages, the subsurface investigation report(s) shall be issued in both languages.
>
> In addition to providing the subsurface investigation report(s), the foundation information required by the current *National Building Code of Canada* (Division C, Part 2, 2.2.4.6) shall be included on foundation drawings.

2.4.14 Prequalification and Pre-Award Submissions

Do not include in the specifications any mandatory contractor and/or subcontractor prequalification or pre-award submission requirements that could become a contract award condition. If a prequalification process or a pre-award submission is required, contact the Departmental Representative.

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

2.4.15 Contracting Issues

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

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

2.4.16 Specification Submission Format

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

2.4.16.1 Specification Hard Copy Deliverable Format

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

2.4.16.2 Specification Electronic Copy Deliverable Format

Specifications submitted electronically shall be:

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

2.5 Addenda

2.5.1 Format

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

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

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

2.5.2 Content

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

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

3 Cost Estimates

3.1 Cost Estimates Submission Formats

3.1.1 Format

Construction cost estimates for projects shall be prepared in the elemental analysis format, which is in accordance with the latest edition issued by the Canadian Institute of Quantity Surveyors (CIQS) for all PWGSC regions excluding Quebec. Within Quebec region the cost estimates shall be prepared in the Uniformat 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% □ 50% or 66% □ 99% □ 100% □**	

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

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

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

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

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

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

Consultant’s Representative: ____

Firm name: ____

Signature: ______________________________ Date: ____________________

Appendix B Drawings and Specifications Table of Contents Template

B.1 General

List all drawings by number and title.

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

B.2 Sample Table of Contents

Project No: **Table of Contents** **Index**

____________ **Page 1 of __**

DRAWINGS:

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

SPECIFICATIONS:

DIVISION	SECTION	NO. OF PAGES
01	01 00 10 – General 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 1st Tier Subfolder

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

D.2.2 2nd Tier Subfolder

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

D.2.3 3rd Tier Subfolder

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

D.2.4 4th Tier Subfolder - Drawings

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

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

- Y

Where:

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

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

For the “Drawings - Dessins” folder:

= Y - Z

Where:

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

Y = the English title of the folder

Z = the French title of the folder

Example:

04 - Electrical – Électrique

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

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

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

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

D.2.5 4th-Tier Subfolders for Specifications

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

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

- Y

Where:

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

Y = the title of the folder

Example:

02 – Divisions

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

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

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

D.2.6 Directory Structure Example

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

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

D.3 Naming Convention for PDF Files

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

D.3.1 Drawing File Names

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

X### - Y

Where:

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

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

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

Example:

A001 - First Floor Details

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

The following important points about drawings are to be noted:

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

D.3.2 Specifications

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

D.3.3 Documents Other Than Specifications Divisions

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

- Y

Where:

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

Y = Name of the document

Example:

01 – Drawings and Specifications Index

D.3.4 Specifications Divisions

The specifications divisions must be named as follows:

Division ## - Y

Where:

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

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

Example:

Division 05 – Metals

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

D.4 Media Label

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

Project Number / Numéro de projet

Project Title / Titre du projet

Documents for Tender / Documents pour appel d’offres

Disk X of/de X

Example:

Project 123456 / Projet 123456

Repair Alexandra Bridge / Réparation du pont Alexandra

Documents for Tender / Documents pour appel d’offres

Disk 1 of/de 1

Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat
R107448
Security Classification / Classification de sécurité UNCLASSIFIED

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine: Public Works and Government Services Canada

2. Branch or Directorate / Direction générale ou Direction: Accommodation Management, RPS

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

Functional Program for ISC Canada Place

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

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

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

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

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

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

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

Canada ☑	NATO / OTAN ☐	Foreign / Étranger ☐

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

Canada	NATO / OTAN	Foreign / Étranger
No release restrictions / Aucune restriction relative à la diffusion ☑	All NATO countries / Tous les pays de l'OTAN ☐	No release restrictions / Aucune restriction relative à la diffusion ☐
Not releasable / À ne pas diffuser ☐		
Restricted to: / Limité à : ☐	Restricted to: / Limité à : ☐	Restricted to: / Limité à : ☐
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

Canada	NATO / OTAN	Foreign / Étranger
PROTECTED A / PROTÉGÉ A ☑	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ ☐	PROTECTED A / PROTÉGÉ A ☐
PROTECTED B / PROTÉGÉ B ☐	NATO RESTRICTED / NATO DIFFUSION RESTREINTE ☐	PROTECTED B / PROTÉGÉ B ☐
PROTECTED C / PROTÉGÉ C ☐	NATO CONFIDENTIAL / NATO CONFIDENTIEL ☐	PROTECTED C / PROTÉGÉ C ☐
CONFIDENTIAL / CONFIDENTIEL ☐	NATO SECRET / NATO SECRET ☐	CONFIDENTIAL / CONFIDENTIEL ☐
SECRET / SECRET ☐	COSMIC TOP SECRET / COSMIC TRÈS SECRET ☐	SECRET / SECRET ☐
TOP SECRET / TRÈS SECRET ☐		TOP SECRET / TRÈS SECRET ☐
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) ☐		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) ☐

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?
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :
☑ No / Non ☐ Yes / Oui

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

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

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

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

☑ RELIABILITY STATUS / COTE DE FIABILITÉ
☐ CONFIDENTIAL / CONFIDENTIEL
☐ SECRET / SECRET
☐ TOP SECRET / TRÈS SECRET
☐ TOP SECRET– SIGINT / TRÈS SECRET – SIGINT
☐ NATO CONFIDENTIAL / NATO CONFIDENTIEL
☐ NATO SECRET / NATO SECRET
☐ COSMIC TOP SECRET / COSMIC TRÈS SECRET
☐ SITE ACCESS / ACCÈS AUX EMPLACEMENTS

Special comments:
Commentaires spéciaux : __________

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

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

If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté?
☑ No / Non ☐ Yes / Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET 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, classifier 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, classifier 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).

Respect • Integrity • Excellence • Leadership

Serving GOVERNMENT, Serving CANADIANS.

Architectural & Engineering Services

TERMS OF REFERENCE

Functional Program

Indigenous Services Canada (ISC)

Edmonton, Alberta

June 15, 2020

Table of Contents:

1 PROJECT DESCRIPTION

1.1 GENERAL

1.1.1 Purpose of Terms of Reference (TOR)

.1 Public Works & Government Services Canada (PWGSC) requires the services of an architectural or licensed interior design firm, acting as the prime consultant with a multi-disciplinary team of sub-consultants qualified to provide change management, functional programing and furniture assessment services required for this project.

1.1.2 The Doing Business with PWGSC Documentation and Deliverables Manual

.1 The TOR describes the project specific requirements, services and deliverables while the *Doing Business with PWGSC Documentation and Deliverables Manual* outlines the standards and procedures for documents, cost estimating and project scheduling.

.2 Document precedence:

  .1 In the event of a document conflict the TOR takes precedence.

1.1.3 Project Information

Project Information	
Project Title:	Indigenous Services Canada (ISC) Functional Program and Furniture Assessment / Inventory
Project Address:	9700 Jasper Avenue, Edmonton, Alberta
Contract Number:	TBD
PWGSC Project Number:	R.107448
PWGSC Contracting Officer:	TBD
PWGSC Departmental Representative:	Brenda Embury

1.2 BACKGROUND INFORMATION

1.2.1 User Department

.1 The User Department referred to throughout the TOR is Indigenous Services Canada.

.2 Indigenous Services Canada (ISC) works collaboratively with partners to improve access to high quality services for First Nations, Inuit and Métis. Their vision is to support and empower Indigenous peoples to independently deliver services and address the socio-economic conditions in their communities.

.3 ISC Edmonton office operations is presently located in Canada Place, located in Edmonton Alberta. They occupy main floor, 6^{th}, 7^{th} and 8^{th} floor. Their main floor location operation accepts public traffic.

1.2.2 User Department's Need

.1 Under the Government of Canada Workplace Fit-up Standards Program of Work, ISC has identified a need to implement a Functional Program review in order to capitalize on the opportunity to create a modernized workplace environment.

.2 This Workplace modernization will impact the traditional ISC office accommodation by changing the way people are accommodated at work now and into the future

.3 ISC require a review of space to determine and gain efficiencies within their current location. ISC has a goal to remake their space more efficiently, to maximize the utilization of space, furniture and technology capabilities to best suit their unique operations.

.4 In order to prepare ISC for the concept of modernization and the functional programming, a series of change management sessions and focus group meetings with progressively more detailed information and showcasing furniture options and styles of collaboration will be needed for team engagement and transition in working philosophy as ISC has been in their current accommodations for over 30 years.

.5 Input and buy in needs to come from ISC senior management and on down through all levels of the organization to enable each to contribute to the development of effective and innovative operational solutions.

.6 Following the change management, and in order to understand ISC's spatial requirements, a Functional Program is needed, including surveys, questionnaires, and test spaces.

.7 The approach for this Functional program is to investigate ISC's unique requirements beyond just spatial relations, adjacencies and SPS requirements, and include analysis of departmental hierarchies, and design and furniture interventions.

.8 ISC's new space needs to provide a high level of operational efficiency to allow each team member to function with flexibility, focus and high performance in the delivery of their services to Canada's First Nations and Inuit in their new space.

.9 Through this Functional Programming, the consultant is to determine the required amount of office and special purpose space required.

1.2.3 Existing Conditions

.1 ISC is currently located in Canada Place in Edmonton, Alberta and occupies 7611 m^2u of combined office and special purpose space on the main, 6th, 7th and 8th floor.

  .1 The existing conditions provide accommodation for 580 FTEs.

    .1 ISC's business lines and organizational chart is below:

.2 ISC identified the following programs and number of FTE's under Edmonton Regional Operations:

.1 Regional and Associate Directors General

Indig. Govern. & Capacity	7 FTE

.2 Planning and Coordination Secretariat

MGMT & Oversight	5 FTE

.3 Director, Education and First Nation Relations Treaty 6

Band Moneys	3 FTE
Education	21 FTE
Estate Mgmt	4 FTE
Indig Govern & Capacity	18 FTE
MGMT of Individual Monies	1 FTE
MGMT & Impl-Agnts & Treaties	4 FTE

.4 Director, Community Infrastructure & First Nation Relations Treaty 7

Education Facilities	7 FTE
Emergency MGMT Assistance	1 FTE
Housing	4 FTE
Indig Govern & Capacity	4 FTE
Other Comm Infra & Activ	14 FTE
Water & Wastewater	20 FTE

.5 Director, Social Programs and First Nations Relations, Treaty 8

FN Child & Family Services	11 FTE
Income Assistance	14 FTE
Indig Govern & Capacity	11 FTE
MGMT & Oversight	1 FTE

.6 Director, Lands & economic Development – Intergovernmental Relations

Budget 2016 Waste	1 FTE
EC Dev Capacity & Readiness	4 FTE
FED Initiative on Consultation	1 FTE
FNLM	2 FTE
Indig Govern & Capacity	3 FTE
Land Natural Res & Env MGMT	29 FTE
MGMT & Impl – AGMTS & Treaties	1 FTE
MPMO	1 FTE
SPI	1 FTE
UPIP	1 FTE

.7 Director, Corporate and Funding Services

Financial Management	15 FTE
Indig. Govern. & Capacity	1 FTE

Information Management	8 FTE
Information Technology	6 FTE
Material	4 FTE
MGMT & Oversight	8 FTE
Real Property	1 FTE
Registration & Membership	13 FTE

.8 Programs under FNIHB AB Region

Executive Secretariat	11 FTE
Strategic Health Initiatives and Partnerships (SHIP)	13 FTE
Operations and Infrastructure	45 FTE
Jordan's Principle	26 FTE
Office of Senior Medical Officer of Health (OSMOH)	10.2 FTE
Non-Insured Health Benefits (NIHB)	73 FTE
Nursing	38 FTE
Health Protection and Promotion	47 FTE
Mental Wellness	14 FTE
Capital	11 FTE
Synergy in Action (SIA)	12 FTE

.9 Programs under Programs AB Region:

FNIHB Finance	9 FTE
HR	21 FTE
FNIHB IM	4 FTE
Communications	4 FTE
Crown Relations	1 FTE
Security	1 FTE
Accommodation	1 FTE
FNIHB IT	6 FTE

.10 ISC has approx. 114 m^2 of high density storage which requires structural loading capacity – the floor plate in Canada Place accommodates.

.11 The existing conditions provide enhanced security with restricted public access, an alarm system, and CCTV camera monitoring.

.12 The space has access to a freight elevator and loading dock.

1.2.4 Issues, Opportunities, Challenges and Constraints

.1 The Consultant must obtain security clearances for all the firm's personnel as well as any sub-consultants in order to visit the project site for site reviews, attendance for change management and functional programming meetings, etc. Security clearance checks may include credit checks.

.2 All site visits must be arranged through the Departmental Representative.

.3 All site visits to take place during normal working hours.

.4 Gathering of functional requirements from the ISC business lines in order to both implement and contrast against the PWGSC fit-up standards (such as but not limited to support space adjacencies and the application of adjacencies).

.5 Developing innovative approaches to achieve a modernized workplace by incorporating flexibility, work point and workspace variety that support an array of work activities.

.6 Assessing and filtering the amount of physical file storage an employee needs to perform their work.

.7 Changing employee's perception that:

  .1 work can only be done in a workstation,

  .2 workspace sizes are an entitlement, and that

  .3 the workspace is an employee's personal space.

.8 Promoting benefits of being mobile, and gain employee acceptance of a modernized working environment which will impact the way in which all levels of ISC work.

.9 Employing an efficient and integrated approach with key stakeholders such as, but not limited to Security and Technologies Information Management (IT). ISC to facilitate an alignment between the needs of the modernized workplace with the tools needed to successfully implement the initiative.

.10 For the purpose of this TOR, for all aspects of the workplace modernization/ABW approach, the consultant shall work closely with the project team, including but not limited to change management resources, to ensure appropriate material is communicated throughout.

1.3 SUMMARY OF WORK

1.3.1 GENERAL SUMMARY

.1 Provide Change Management and Functional Programming services which:

  .1 Support ISC through engagement of all organizational levels, to work through resistance to acceptance and massage out the essence of how the department can function most effectively in a new and modernized work environment.

  .2 Investigate and discover all physical elements required for the functional and operational needs of each branch and space.

  .3 Determine if all high density storage is required.

  .4 Confirm if ISC requires access to a freight elevator and loading dock.

.5 Identify any resistance or challenges to the new and modernized work environment.

1.3.2 CHANGE MANAGEMENT INFORMATION GATHERING AND RECOMMENDATIONS:

.1 Incorporate the end-state vision, principles and approved standards into the information gathering process and workplace recommendations. The method must demonstrate the application of the key elements of workplace modernization.

.2 Assist the ISC project team to further define the modernization workplace expectations by researching, surveying/questioning and analyzing end-users essential requirements along with the objectives, vision and design principles of workplace renewal.

.3 Use the information gathered from ISC end-users and management representatives to prepare a comprehensive report, including space data sheets, cost analysis and presentation.

.4 Provide recommendations and supporting documentation for the purpose of obtaining upper management approval on a modernized workplace.

  .1 Recommendations should include but not be limited to the analysis of the pros and cons, security, telecommunication, space utilization, user requirements and best value.

.5 Prepare presentation materials and support during presentations and information sessions,

.6 Engage stakeholder groups in the Workplace Renewal Initiatives (Workplace modernization initiative),

.7 Build a cohesive team approach that is transparent and informative to encourage a positive relationship between the end-users and the project team.

.8 Support the project team in assisting end-user workgroups and teams talk about their workplace of the future by:

  .1 Creating awareness about different work styles
  .2 Linking work functions and activities to work spaces
  .3 Seeing new ways of working

1.3.3 FUNCTIONAL PROGRAMMING:

.1 Employ findings of Change Management focus groups to create a modernized workplace environment, looking beyond the traditional accommodations and patterns of working, and looking forward to the way people work both now and into the future.

.2 Identify requirements for optimal effectiveness of general office, support space and special purpose space considering culture, and issues, constraints and challenges;

.3 Documents compliance and non-compliance with the Government of Canada Workplace Fit-up Standards, in consultation with PSPC and Indigenous Services Canada;

.4 Progressively synthesize and consolidate findings throughout the Functional Program Project and reporting.

1.4 OBJECTIVES

1.4.1 General Goals

.1 The objectives for this project are to establish ISC user specific requirements and determine the best approach to implement a modernized workplace for the future along with the following;

.2 To create a modern open work environment with natural light, views, supporting mental health, well-being and sustainability. Supports a diverse activity-based workspace (or work points) to help enhance performance through;

- .1 Determining the required number of enclosed spaces, meeting rooms and boardrooms.
- .2 Maximizing space utilization with a combination of/ratio of workstations to employees and additional work points outside of traditional assigned workspaces.
- .3 Laying out unassigned and assigned work points in a variety of sizes, furniture types and configuration supporting diverse activities.
- .4 Creating variability in spaces and activity based work points emphasizing mobility, inspiring creativity and innovation, and supporting comfort and productivity for individual and collaborative work.

.3 Use technology, tools and systems that are efficient and cost effective, allowing opportunities for freedom and mobility so employees can work wherever and however they can be most productive such as through;

- .1 Information Management; quick, easy, intuitive access to corporate information using electronic filing systems.
- .2 Easy and seamless access to digital tools and information including WIFI, supporting technology in meeting spaces, collaborative spaces.
- .3 Allowing for greater collaboration, productivity and engagement away from the desk.
- .4 Reducing reliance on paper and paper storage through screen size and configuration that enables the use of technology.

.4 Create a collaborative workplace environment to support organizational success through;

- .1 Increasing flexibility to work anywhere, anytime while maintaining security and responsiveness, and incorporating technologies to support the modernized workplace.
- .2 Deploying a simplified and sustainable approach to office allocation.
- .3 Supporting employee wellness and productivity.

1.4.2 PROJECT DELIVERY

.1 Provide fully integrated and coordinated professional services for the delivery of a project in accordance with the requirements in the TOR and as contained herein.
.2 Coordinate all services with the Departmental Representative.
.3 Establish a cohesive functional partnership and open communication between all members of the project delivery team throughout the project.
.4 Maintain continuity of key personnel and a dedicated working team for the life of the project.
.5 Deliver the project to be within:
  .1 The Project Milestones in this TOR.
.6 Implement a Collaborative Project Delivery (CPD) process and culture of open communication and trust.
.7 Conduct Quality Assurance reviews during the Project Milestones.

1.5 SUMMARY OF SERVICES AND SPECIALTIES

1.5.1 GENERAL SERVICES

.1 Provide a full consulting team including the following consultant services and specialties:
  .1 Professional/Registered Architectural Services:
    .1 Must have significant experience in functional programming in accordance with the Canadian Handbook of Practice for Architects, or equal,
  .2 Interior Design Services:
    .1 Professional Interior Designer NCIDQ, Provincial Licensing, where applicable,
    .2 Must have significant knowledge of furniture solutions to create flexible modern offices. experience.
  .3 Cost Estimating specialist;
    .1 Certified by the Canadian Institute of Quantity Surveyors.

1.6 SCHEDULE

1.6.1 GENERAL

.1 Deliver the project in accordance with the project milestone listing identified below.
.2 Prepare a Project Schedule in accordance with the milestone list.
.3 The Consultant may elect to continue to work on the project during reviews but will not be reimbursed for changes resulting from the reviews.

1.6.2 ANTICIPATED MILESTONE DATES

Project Phase	Milestone Completion Date	Number of Weeks
Consultant Contract Award		
Visioning session (allow 1 day)		2 Weeks
Submission presentation and revisions.		4 Weeks
Approval of Visioning Session		1 Week
Focus Information gathering sessions with each Unit management representative (allow one day per unit – total: 19 units		4 Weeks
Submission presentation and revisions		2 Weeks
Focus group presentation approval		1 Week
Survey to all staff (electronic survey)		3 Weeks
Submission presentation and revisions		1 Weeks
Complete test site		
Town Hall session 1		1 Weeks
Visioning and confirmation session		2 Weeks
Draft Functional Program		4 Weeks
PWGSC Quality Assurance Review		2 Weeks
100% submission Functional Program	October 14, 2021	1 Weeks

1.7 EXISTING DOCUMENTATION

1.7.1 AVAILABLE FOR THE CONSULTANT

.1 Limited as-built drawings will be available at the start of the Pre-Design phase.

.2 Canada Place Building drawings are in AutoCAD (dwg) format.

.3 PWGSC space calculator,

.4 GC Workplace Fit-up Standards & Design Tool kits.

1.7.2 DISCLAIMER

.1 Reference information will be available in the language in which it is written.

.2 The documentation may be unreliable and is offered, "as is" for the information of the Consultant.

2 REQUIRED SERVICES

2.1 GENERAL REQUIREMENTS

2.1.1 SERVICES

.1 Functional Programming including
.2 Additional Service
  .1 Change Management (visioning sessions and town halls)
.3 Cost Management

2.2 PROJECT REVIEW AND ACCEPTANCE

2.2.1 GENERAL

.1 Comply with all applicable laws and regulatory requirements as required by the General Conditions of the Contract.

2.2.2 FEDERAL GOVERNMENT

.1 The federal authorities having jurisdiction over this project are:
  .1 PWGSC;
  .2 Indigenous Services Canada for functional requirements and project review.

2.2.3 QUALITY ASSURANCE REVIEWS, ACCEPTANCE AND PRESENTATIONS

.1 PWGSC Review:
  .1 The purpose of this review is Quality Assurance;
  .2 Submission of documents shall be in the following format: reports, drawings, and presentations;
  .3 Submissions will be reviewed at key milestones during the Functional programming;
  .4 For each review provide one submission (i.e. electronic copies of documents in pdf format) plus any follow-up submissions.
.2 At each stage:
  .1 Review submissions to be posted on AutoDesk BIM 360 or FTP site in searchable PDF format;
  .2 Expected turnaround time for reviews is 10 working days;
  .3 The consultant team will receive review comments in the form of an editable MS Word document or MS Excel document;
  .4 The consultant shall provide a single coordinated written response to the comments within 2 weeks of receiving review comments;
  .5 The purpose of this review is information and awareness for PWGSC and not quality control for the Consultants. The Consultant Team must employ their own quality control program and remain fully responsible for the design and services provided.

2.3 COST MANAGEMENT SERVICE

2.3.1 GENERAL

.1 Include the following cost management services in addition to the cost estimating requirements of the Doing Business with PWGSC Manual:

- .1 Class D cost estimate based on findings of the Functional Program.

2.4 FUNCTIONAL PROGRAMMING SERVICE

2.4.1 GENERAL

.1 The Functional Programming Report will be utilized as the benchmark project control document to monitor progress of the project.

.2 Functional Programming is comprised of the following activities:

- .1 Assess existing site and conditions;
- .2 Review all existing documents and reports, and;
- .3 Confirm and document functional requirements through information gathered in visioning sessions, surveys, focus groups, presentations, townhalls etc.
- .4 Developing furniture concepts to meet the functional program workpoints.

2.4.2 SCOPE AND ACTIVITIES

.1 Participate in meetings, prepare minutes and decision logs.

.2 Visit the project site, and analyse site conditions.

.3 Review and analyse:

- .1 Existing reports, documents and material related to the project, including the functional requirements, and all other requirements identified in this TOR;

.4 Analyse and confirm:

- .1 Project specific goals and objectives;
- .2 All the program information and project requirements to identify any conflicts or potential additional work and indicate the impact on project scope, schedule and costs;
- .3 All existing information relating to this project;
- .4 Requirements for multi-media, security, and IT system strategies.
- .5 All additional information that will be required to deliver the project;
- .6 Any conflicts that will need to be addressed with respect to scope, quality, schedule, and cost;

.5 Report on adjustments to final budgets risk conflicts and schedule, including allowances for reviews and approvals.

.6 Meet with the User Department to develop the functional requirements.

.7 Prepare agenda and focus/visioning presentation materials, online survey formats/questionnaires, presentation boards/samples of, to

facilitate on site assessments and meetings to facilitate the User Department's functional space requirements and operational/service requirements:
- .1 Develop and document for User Department approval the relationship and adjacencies of all functional areas.
- .2 Incorporate the change management surveys to determine user department readiness to move into a modern workplace,
- .3 Identify resistance areas and technology readiness to move into GC Workplace accommodations, and
- .4 Provide educational material.
- .5 Review and incorporate requirements set out in the need, scope of work and objectives statements in Part 1 of this TOR.

.8 Prepare a complete list of all functional needs clearly describing all space requirements including:
- .1 Area requirements for each individual functional space type;
- .2 Useable areas for each function;
- .3 Total useable area requirements for this project, and;
- .4 A description of work activity within each space.

.9 Provide a summary of each functional space type including:
- .1 Common spaces;
- .2 Equipment spaces;
- .3 Support spaces, and;
- .4 Furniture required for support space or functional spaces.
- .5 Other functional spaces required by the User Department.

.10 Provide a summary of the number (and type) of staff for each functional space.

.11 Provide a description of the technical requirements for Architectural, including:
- .1 Required operational and service infrastructure;
  - .1 Identify all Structural, Mechanical and Electrical systems to support the project program,
  - .2 Identify all security, acoustic and special fire separation requirements, and;
- .2 Identify all Audio Visual and IT requirements;
  - .1 Collaborate with the User Department and Shared Services Canada (SSC).

.12 Presentations to include high level visuals, including 3D photos or renderings.

.13 Incorporate the change management process at least at the beginning and mid-way through the Functional Programming service to determine ISC resistance or acceptance/ client temperature and readiness to continue with the process.

.14 Provide recommendations on furniture to suit ISC staff operational preferences and functional requirements.

.15 Identify major equipment and millwork that would affect the space requirements.

.16 Review and define the User Department's storage requirements:

- .1 Size, locations and furnishings/equipment.

.17 Prepare an estimate of the costs:

- .1 Prepare, based on the Functional Program, a budgetary summary of design items/components and estimated cost breakdown, and;
- .2 Include a Class 'D' construction and soft cost estimate in the compiled Functional Program document.

.18 Develop physical test space within the tenant department's existing accommodations; to include ten (10) 'head's down' work points, five (5) 'touch down' work points and two (2) focus rooms.

.19 Based upon the approved draft Functional Program, develop, for acceptance by the Departmental Representative and User Department, the following:

- .1 Spatial relationship diagrams to indicate adjacency requirements between each of the spaces and groups of spaces, minimum of 2 options with 3 test fits based on surveys and;
- .2 Block plans:
  - .1 Showing the location of each functional component, and;
  - .2 To determine reasonable net to gross area ratios for the total building addition (including service spaces).
  - .3 Determine reasonable work points and samples of furniture for each common group or component

.20 Refer to Definitions for Functional Program. This project is anticipated to be a combination of Level 2 & Level 3 for high density file and special purpose areas.

2.4.3 FUNCTIONAL PROGRAMMING MEETINGS

.1 Arrange and facilitate visioning sessions, focus groups and townhalls with the user groups; depending on similarities between groups, a minimum of two (2) meetings per user group in Edmonton throughout the information gathering for functional programming;

- .1 Introduce the functional programming process, stages and required arrangements and authorities, and;
- .2 Participate in a site tour to understand the occupancy and operational requirements, office support areas, Special Purpose Space needs and layouts, and project related requirements.

.2 Arrange and facilitate follow up sessions during Functional Programming Services as required.

2.4.4 DELIVERABLES

.1 Test space with furnishings.

.2 Draft Functional Program Report documenting the Functional Programming scope and activities.

- .1 Revise as required.

.2 Provide one (1) electronic PDF copy on BIM 360 or FTP electronic transfer.

.3 100% Functional Programing Report documenting the "Scope and Activities" and associated progressive deliverables including Furniture and Functional Programming report.

.1 The Furniture report is to list suggested types of furniture that would meet the end user client's needs. This furniture can then be used in the next stage of the project.

.2 Revise as required.

.3 Provide one (1) electronic PDF copy on BIM 360 or FTP site electronic transfer.

.4 Final Functional Programming and Furniture Recommendation Report

.1 Revised as required addressing comments from 100% Quality Assurance review and from User Department.

2.4.5 ADDITIONAL SERVICES

.1 General

.1 Benchmark on readiness temperature at the mid-point and end of the Functional Programming exercise above.

.2 This is the building block to determine ISC support for the findings of the functional program.

.3 Provide the client with the tools to proceed with the change management once the functional program contract is complete.

.2 Scope and Activities

.1 Update and re-confirm the status of the Functional Program and provisions of support for change management with ISC management. Allow for the following:

.1 Focus Group(s) Requirement: 7 groups within ISC = 7 different Focus Group Sessions

.1 Introduction

.2 Schedule Workshops

.3 Evaluate and prepare Workstyles

.4 Prepare Report

.5 Confirm direction with Governance Team

.6 Share

.2 Round Table Conversations – Q and A Requirement: 2 RT Conversations with Exec/Sr. Management (Visioning Session #1, Visioning Session #2)

.1 Focused discussion

.3 Administer Surveys / Questionnaire (s) – Introduction Requirement: Issue Surveys/Questionnaires to approx. 250 employees

.1 Administer Questionnaire – online

.2 Evaluate and Test Workstyles

.3 Prepare Report

- .4 Confirm direction with Governance Team
- .5 Share

.4 Townhall meetings Requirement: 2 Townhall meetings for all staff (580 employees divided between the two townhall meetings); allow 8 hours presentation time over the 2 townhalls.

- .1 Verbal presentation to staff
- .2 Accompanying visuals, including drawings, sketches, renderings, photos, slide
- .3 Decks, etc.
- .4 Provision of documented speaking points for use of ISC Managers after townhall sessions, specifically with regard to:
  - .1 The vision
  - .2 The findings
  - .3 The ISC workplace of the future: work types, space requirements, schematic block plans
- .5 Provision of simplified slide deck for use of ISC Managers after townhall sessions.

.5 Schematic ABW Block Schematic Plans Requirement: 3 options

- .1 Prepare Responsive ABW schematic block plan based on data collected to date – 3 options

3 PROJECT ADMINISTRATION

3.1 GENERAL REQUIREMENTS

.1 The administration requirements outlined in this section are applicable to all PWGSC projects in the Western Region, unless otherwise indicated in the TOR.

.2 All team members must maintain a professional, cordial and collaborative relationship.

3.2 LANGUAGE

.1 All documents must be prepared in English.

3.3 MEDIA

.1 The Consultant shall not respond to any media inquiry.

.2 Direct all media requests to the Departmental Representative.

3.4 PROJECT MANAGEMENT

3.4.1 GENERAL

.1 PWGSC administers the project on behalf of Canada and exercises continual control over the project during all phases of development.

.2 This project is to be organized, managed and implemented in a collaborative manner.

.3 The PWGSC project management team, the Consultant, and the User Department teams are to work cooperatively at every stage of the Pre-Design process in order to assure the creation of a successful and meaningful work.

.4 Under the leadership of the PWGSC Departmental Representative, all team members are responsible for establishing and maintaining a professional and cordial relationship.

3.5 LINES OF COMMUNICATION

.1 All communications will be through the Departmental Representative, unless directed otherwise.

  .1 This includes formal contact between the Consultant, the PWGSC Project Team and the User Department.

.2 Direct communication between members of the PWGSC Project Team on routine matters may be required for resolution of technical issues.

  .1 However, this shall not alter project scope, budget or schedules, unless confirmed in writing by the Departmental Representative.

3.6 MEETINGS

3.6.1 GENERAL

.1 The Departmental Representative will arrange meetings as required throughout the project, with representatives from:

  .1 The User Department;

  .2 PWGSC;

  .3 The Consultant team, and;

.2 Standing agenda items shall include:
   .1 Project Schedule;
   .2 Cost;
   .3 Risk;
   .4 Quality, and;
.3 Project Start-up Meeting:
   .1 Shall be arranged and facilitated by the Departmental Representative, and;

3.7 CONSULTANT RESPONSIBILITIES

.1 The Consultant Team includes the Consultant's staff, sub-consultants and specialists.
   .1 This team must maintain valid expertise for the duration of the project;
   .2 The team must include qualified registered architectural professional and licensed interior designer with extensive relevant experience and who are capable of providing all required services;
   .3 Team members may be qualified to provide services in more than one discipline, and;
   .4 The Consultant may expand the team to include additional disciplines.
.2 The Consultant is responsible for:
   .1 Obtaining Departmental Representative acceptance for each project phase before proceeding to the next phase;
   .2 Accurately communicating design, budget, and scheduling issues to staff, sub-consultants and specialists;
   .3 Coordinating the quality assurance process and ensuring that submissions of sub-consultants are complete and signed-off.

3.8 PWGSC RESPONSIBILITIES

3.8.1 ADMINISTRATION

.1 PWGSC administers the project and exercises continual control over the project during all phases of development.
.2 The following administrative requirements apply during all phases of the project delivery.

3.8.2 REVIEWS

.1 PWGSC will review the work at various stages and reserves the right to reject unsatisfactory work at any stage.
.2 If later reviews show that earlier acceptances must be withdrawn, the Consultant shall redo and re-submit at no extra cost.

3.8.3 ACCEPTANCE

.1 PWGSC acceptance of submissions from the Consultant simply indicates that - based on a general review - the material complies with governmental objectives and practices, and meets overall project objectives.

.2 Acceptance does not relieve the Consultant of professional responsibility for the work or compliance with the contract.

3.8.4 PWGSC Project Management

.1 The Project Manager assigned to the project is the Departmental Representative.

.2 The Departmental Representative is directly responsible for:

- .1 The progress and administration of the project, on behalf of PWGSC;
- .2 Day-to-day project management and is the Consultant's single point of contact for project direction, and;
- .3 Providing authorizations to the Consultant on various tasks throughout the project.

3.8.5 PWGSC Architecture and Engineering Centre of Expertise (AECOE)

.1 Provides advisory services and quality assurance reviews of consultant deliverables.

.2 Participates regularly in project milestones and may attend meetings as and when required.

.3 Provides a Design Manager for the project who will coordinate the services of AECOE.

3.9 USER DEPARTMENT RESPONSIBILITIES

3.9.1 User Department Project Leader

.1 Is accountable for the expenditure of public funds and delivery of the project in accordance with the terms accepted by the Treasury Board.

.2 Reports to the senior User Department executive management.

.3 Will play several critical roles for the successful implementation of the project, including:

- .1 Coordination of the quality, timing and completeness of information and decisions relating to issues related to the functional performance of the facility.

3.10 TECHNICAL REPORTS

.1 Technical Reports are official government documents, which are used to support an application for approval or to obtain authorization or acceptance. Technical Reports must:

- .1 Be complete, clear and professional in appearance and organization, with proper reference to related parts and contents in the report;
- .2 Clearly outline the intent, objectives, process, results and recommendations;
- .3 Present the flow of information and conclusions in a logical, easy to follow sequence;
- .4 Be in written narrative, graphic, model (traditional and/or computer generated), and photographic format, which can be web enabled;
- .5 Ensure that all pages are numbered in sequence, and;

  .6 Be printed double-sided, if hard copies are produced.

.2 Standard practice for the organization of technical reports include:

  .1 A cover page, clearly indicating the nature of the report, the date, the PWGSC project number and who prepared the report;

  .2 A Table of Contents;

  .3 An Executive Summary;

  .4 The body of the report is to be structured such that the reader can easily review the document and locate, respond to and/or reference related information contained elsewhere in the report easily;

  .5 Appendices are to be used for lengthy segments of the report, supplementary and supporting information and/or for separate related documents.

.3 The report content must:

  .1 Ensure that the executive summary is a true condensed version of the report following the identical structure, including only key points and results/recommendations requiring review and/or approval;

  .2 Use a proper numbering system (preferably legal numbering), for ease of reference and cross-reference;

    .1 The use of 'bullet points' are to be avoided.

  .3 Use proper grammar, including using complete sentences, in order to ensure clarity, avoid ambiguity;

    .1 The use of undefined technical terms, industry jargon and cryptic phrases are to be avoided.

  .4 Be written as efficiently as possible, with only essential information included in the body of the report and supporting information in an appendix if needed.

4 DEFINITIONS

4.1 PURPOSE

4.1.1 Document Definitions:

.1 Definition of words and phrases in the Terms of Reference (TOR), and *Doing Business with PWGSC – Documentation and Deliverables Manual* to:
  - .1 Expand the detail associated with the services and deliverables addressed in the above Documents, and;
  - .2 Ensure a clear understanding of the project scope, procedures, and Quality performance requirements.

4.2 DEFINITIONS

4.2.1 Acceptance

.1 A formal action taken by an assigned person with authority (contractual or otherwise) to declare that some aspect of the project are permitted to proceed.

4.2.2 Basis of Estimate (BOE)

.1 A "living" document throughout the project design and project life cycle.

.2 Provides a framework for progress monitoring and reporting.

.3 Prepared and updated to facilitate the understanding, assessment and validation of the estimated value breakdowns, independent of any other supporting documentation.

.4 Includes:
  - .1 Level of consensus between concurrent/third party estimates;
  - .2 Estimate methodology;
  - .3 Basis of pricing - cost data sources, and allowances;
  - .4 Description of information obtained and used in the estimate including the date received;
  - .5 Notable assumptions, exclusions and inclusions;
  - .6 Listing of items/issues carrying notable risks;
  - .7 Opportunities, and any deviations from standard practices;
  - .8 Record of pertinent communications and agreements that have been made between the estimator and other project stakeholders;
  - .9 Major changes relative to previous estimates;
  - .10 Significant market events that may have an effect on the costs, and;
  - .11 Estimate reconciliation.

4.2.3 Budget

.1 Developed using Cost Estimates and the Project Schedule.

.2 Provides a view of how much the project is estimated to cost both in total and periodic terms.

.3 Determines the cost performance baseline for use in cost management variance analysis such as, determining earned performance value.

.4 Is aligned with funding limits to ensure funding availability/appropriation.

.5 Also refer to - Estimated Construction Cost definition.

4.2.4 "CANADA", "CROWN" / "HER MAJESTY"

.1 Her Majesty the Queen in right of Canada.

4.2.5 CHANGE MANAGEMENT

.1 Change management takes care of the people side of change. It is useful when gauging resistance and working toward engagement to design new work processes or implement new technologies. Keep the people involved informed and engaged is essential. Success of these changes will be dependent on how individuals in the organization embrace the change.

.2 Change management is the process, tools and techniques to manage the people side of change to achieve its required business outcomes. It is the systematic management of employee engagement and adoption when the organization changes the way work is done and introduces new ways of working and new furniture solutions to allow for flexibility, productivity and collaboration. Change management focuses on how to help employees embrace, adopt and utilize changes in their day-to-day work.

4.2.6 CONCEPT

.1 Activity Based Working (ABW) is a concept which recognizes that through the course of any day, people engage in many different activities and that they need different types of work settings to accommodate these activities.

4.2.7 CONSTRUCTION COST ESTIMATE

.1 Refer to the *Doing Business with PWGSC Manual*, Section 3 - Cost Estimates for further Construction Cost Estimate details.

.2 Construction Cost Estimate as compared to the Budget – see Definition.

.3 In all cases, include Basis of Estimate (BOE) – see Definition.

4.2.8 CONSTANT DOLLAR ESTIMATE

.1 This is an estimate expressed in terms of the dollars of a particular base fiscal year.

.2 It includes no provisions for inflation.

.3 Cash Flow over a number of fiscal years may also be expressed in constant dollars of the base year including no allowance for inflation in the calculation of costs.

  .1 For Current Dollar Estimates – see Definitions;

4.2.9 CONSULTANT TEAM

.1 An architectural or engineering firm and their sub-consultants (the Design Consultant), professionals and advisors with whom PWGSC has contracted to provide other services on this project.

4.2.10 DEPARTMENTAL REPRESENTATIVE (DR)

.1 The person designated in the Contract, or by written notice to the Contractor/Consultant, to act as the Departmental Representative for the purposes of being a Contract entity.

4.2.11 ESTIMATED CONSTRUCTION COST

.1 The Budget identified in the TOR or subsequently in writing by the Departmental Representative:
  - .1 Also stated as “Construction Cost Estimate” or “Construction Cost Limit”.

4.2.12 FUNCTIONAL PROGRAM

.1 May be included in the RFP or may be a Functional Programming deliverable stating the end state functional and operational goals.
  - .1 The term “functional programming” is only one component of a “Programming” service which may also include technical programming, master schedules and program requirement cost estimates.

.2 Defines the design problem by determining the details for achieving the goals. Goals may include, but are not limited to, design considerations regarding:
  - .1 Architecture: Area needs, adjacencies, circulation, acoustics, health and safety, personal forecasts, user characteristics, organizational structure, budget and costs and project schedule;
  - .2 Furniture concepts to meet the functional program workpoints.

.3 One of Three Program Levels of effort are use based on complexity and risk:
  - .1 Level 1 Program is used for small, relatively simple or repetitive types of projects where the standard requirements are well understood, includes;
    - .1 A summary of required useable spaces, along with net areas and general notes outlining specific space requirements;
    - .2 The approximate gross useable area required to accommodate the program;
    - .3 A description, in general terms, of the relationships between spaces and groups of spaces, in sufficient detail to commence the Schematic Design Stage;
  - .2 Level 2 Program is used for larger projects with some degree of complexity, includes;
    - .1 A summary of required useable spaces, along with net areas;

.2 An outline of specific technical and functional requirements for each space;

.3 The approximate gross area required to accommodate the programme, determined by developing component diagrams;

.4 Relationship diagrams indicating adjacencies and flow patterns between spaces and groups of spaces, and;

.3 Level 3 Program is used for major projects and projects with a high degree of complexity, includes;

.1 A qualitative (functional) and quantitative (net area and gross area) description of all required spaces;

.2 Detailed Programme Areas including;

.1 Net useable area requirements for each space;

.2 Component Gross area requirements for all component groups, and;

.3 Gross Area Summary needed to accommodate the programme;

.3 An outline of specific Technical Requirements, indicating general Architectural, Structural, Mechanical, Electrical and Security systems applicable to the entire building and/or to each similar space types;

.4 Room / Space Data Sheets, indicating specific requirements for each space type not covered in the technical requirements;

.5 Space Concept Plans, associated with each Space Data Sheet, indicating all fixed equipment and any special features;

.6 Component (Group or Department) concept planning diagrams indicating required relationships between all spaces in each component group;

.7 Component Relationship Diagrams, indicating relationships between all component groups;

.8 A Demonstration plan (to scale) to confirm that:

.1 Net to gross area ratios are reasonable; and

.2 Component group relationships can reasonably be achieved either within the established gross building area for new buildings or within the limitations of the building floor plate(s) for existing buildings.

4.2.13 Master Schedule (Master Project Schedule)

.1 Refer to the Doing Business with PWGSC Manual.

4.2.14 Partnering Session Workshop(s)

.1 Workshop(s), by the Departmental Representative, as Lead, which includes the Project Team and other stakeholders.

.2 Within the Workshop various members will be required to Lead specific Workshop deliverables as agreed upon by consensus.

.3 Other topics include the:
  .1 Role and responsibilities matrix;
  .2 Rules of engagement;
  .3 Communication plan;
  .4 Project status, goals, objectives, elements, scope, funding, and preliminary schedule;
  .5 Deliverables plan;
  .6 Measures of percentage complete and delivered;
  .7 Issues tracking and documentation systems;
  .8 Project risks and the initial risk management plan;
  .9 Review of existing available documentation and project site conditions;
  .10 Schedule of biweekly (or as otherwise determined by the Departmental Representative) project and milestone meetings; and
  .11 Communication and document control plan.

4.2.15 Project Milestones

.1 PWGSC uses the National Project Management System (NPMS) for management and delivery of its real property projects to align with the Federal Government's review and approval processes and corresponding Required Service (RS) associated with Project Milestones described in the TOR:

.2 Pre-Design (PD)
  .1 The Design Consultant Required Service includes activities such as:
    .1 Analyse the Departmental Representative's information as may be presented at the time of Solicitation and the Project Start-up meeting; and
    .2 Confirm, that based on the provided information, the Design Consultant is prepared to proceed with the Design Contract with regards to schedule, construction cost estimate, scope of work and quality;
      .1 Prior to proceeding with the design, the Design Consultant and the Departmental Representative may discuss additional services from the Consultant or Specialty Consultants, and
      .2 The TOR may pre-establish additional services, such as providing,
        .1 OPR, and,
        .2 Programming,
      .3 Pre-Design documentation become the project delivery guiding documents, utilized throughout the project life cycle.
  .2 Final Deliverable:
    .1 Pre-Design Report.

.3 Progressive Deliverables, such as:
  .1 Functional Program, furniture assessment; and
  .2 Response to PWGSC QA reviews.

4.2.16 PROJECT TEAM

.1 Typically includes entities, such as:
  .1 Departmental Representative,
  .2 Consultant;
  .3 Independent third parties also in contract with PWGSC, and;
  .4 User Department and Operational personnel.

4.2.17 QUALITY

.1 The degree to which the Work meets or exceeds the Project requirements and expectations.

4.2.18 QUALITY ASSURANCE (QA) REVIEWS

.1 PWGSC QA Reviews are an advisory service to the Project Team and stakeholders where respective submission/deliverable accountabilities remain in effect as per contractual conditions or other forms of commitment.
  .1 Design Consultant remains professionally accountable for the design validation and verification required of the Project Milestone submissions during the project life cycle.

.2 QA Reviews, supported by commentary, conclude with a risk assessment associated with Quality of design and documentation deliverables, and include:
  .1 Parameters to confirm at the onset of a review whether deliverables are appropriately scoped and detailed with respect to current Project Milestones or phase/progressive submissions.

.3 QA Reviews focus on Quality Indicators (QI) parameters associated with Design Quality Indicators (DQI) and Quality Deliverable Indicators (QDI).

.4 Design Quality Indicators (DQI):
  .1 3 Aspects of DQI:
    .1 Functionality – design utility;
    .2 Build Quality – design performance, and;
    .3 Impact – project contextual interactivity (such as cultural, market, environmental conditions/factors):
      .1 Project impact on context, and vice versa;
      .2 Context impact on project.
  .2 Each DQI Aspect is considered against Good Design Protocols, such as;
    .1 Creativity and Technical Competence;
    .2 Functional Suitability;
    .3 Whole-of-Life Performance;
    .4 Health, Safety and Security;
    .5 Inspiring and Attractive;

.6 Appropriate Innovation, and;
.7 Sustainable and Enduring.

.3 As each DQI Aspect is considered against Good Design Protocols, each Aspect is also assessed against the same Characteristics such as:
.1 Conceptual Integrity;
.2 Functionality;
.3 Operability;
.4 Constructability;
.5 Biddability, and;
.6 Claims Prevention.

.5 Quality Deliverable Indicators (QDI):
.1 Focus on documentation delivery.
.1 Submitted documentation is assessed against 6 characteristics:
.1 Clarity;
.2 Completeness;
.3 Compliance;
.4 Consistency;
.5 Correctness, and;
.6 Decision Traceability.

4.2.19 WORK

.1 Refer to Contract Documents: General Conditions (GCs).

-------------- END ---------------