



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

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

**11 LaurierSt./ 11, rue Laurier  
Place du Portage, Phase III**

**Core 0B2 / Noyau 0B2**

**Gatineau**

**Québec**

**K1A 0S5**

**Bid Fax: (819) 997-9776**

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

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

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

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

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

**Comments - Commentaires**

**THIS REQUIREMENT CONTAINS A SECURITY  
CLAUSE.**

**Vendor/Firm Name and Address**

**Raison sociale et adresse du**

**fournisseur/de l'entrepreneur**

**Issuing Office - Bureau de distribution**

Infrastructure Maintenance and Solution Services Division  
(FK)

L'Esplanade Laurier,

East Tower 4th Floor

L'Esplanade Laurier,

Tour est 4e étage

140 O'Connor, Street

Ottawa

Ontario

K1A 0R5

<b>Title - Sujet</b> Project Management Support Services Project Management Support Services	
<b>Solicitation No. - N° de l'invitation</b> EN439-211126/A	<b>Date</b> 2020-12-15
<b>Client Reference No. - N° de référence du client</b> 20211126	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$FK-292-79460	
<b>File No. - N° de dossier</b> fk292.EN439-211126	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> Eastern Standard Time EST <b>on - le 2021-01-25</b> Heure Normale du l'Est HNE	
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Mirza, Bushra	<b>Buyer Id - Id de l'acheteur</b> fk292
<b>Telephone No. - N° de téléphone</b> (613) 296-8782 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA PORTAGE III 11 LAURIER ST National Capital Area (Gatineau) Gatineau Quebec K1A0S5 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

**BID SOLICITATION**

**REQUEST FOR PROPOSAL FOR  
REAL PROPERTY PROJECT MANAGEMENT SUPPORT SERVICES (PMSS)**

**VARIOUS REAL PROPERTY RESOURCE CATEGORIES IN MULTIPLE STREAMS  
(SEE HEREIN)**

**FOR**

**PUBLIC WORKS AND GOVERNMENT SERVICES CANADA**

## **IMPORTANT NOTICE TO BIDDERS**

### **Security**

This notice is to advise ALL interested bidders that in order to be awarded a contract which contains a security requirement, all bidders MUST hold a valid Security Clearance granted or approved by PSPC Contract Security Program at the level indicated in this solicitation document.

For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

### **Legal name of department**

Although PWGSC was renamed Public Services and Procurement Canada (PSPC) for communication purposes, the legal name remains Public Works and Government Services Canada in policy instruments and in legal documents including contracts.

**Required Real Property Project Management Support Services**, as stated herein, divided into four (4) workstreams:

Workstream 1: Real Property Project Management Services  
Workstream 2: Project Finance and Performance Management  
Workstream 3: Business Consulting/Change Management  
Workstream 4: Specialized Consulting

### **Intent of the Process**

The intent of the process is to award one (1) individual contract for each workstream for the required services to be provided as a result of this solicitation.

In the event that a Bidder wants to bid on more than one workstream, a separate technical and financial bid must be submitted for each workstream.

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## PART 1 – GENERAL INFORMATION

### 1.1 Introduction

The bid solicitation is divided into seven parts plus **Attachments** and **Annexes**, as follows:

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

**The Attachments** include: the Pricing Schedule, Flexible Grid, Technical Criteria, Indigenous Participation Plan (IPP), Additional Certifications Required Precedent to Contract Award, Evaluation Report per Resource, and Security Requirement Check List (SRCL) Classification Guide.

**The Annexes** include the Statement of Work (SOW), Basis of Payment, Security Requirements Check List (SRCL), Insurance Requirements, Task Authorization (TA) Form and the Template for Reporting on the Results of the Indigenous Participation Plan (IPP).

### 1.2 Summary

#### 1.2.1 Requirement

Public Works and Government Services Canada (PWGSC) requires real property project management support services to be provided by a highly experienced service provider in the field of real property project management. The services will be to assist PWGSC with a full range of day-to-day real property project management duties in support of the Government of Canada Real Property Projects in the National Capital Area. The services must be provided in accordance with Statement of Work included herein at **Annex A**.

The level of effort for the service requirements may vary in accordance with the needs of PWGSC and will be on an 'as and when required basis'.

The services include 24 resource categories/levels which are divided into the following four (4) workstreams:

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Workstream 1: Real Property Project Management Services (10 resource categories/levels)  
Workstream 2: Project Finance and Performance Management (5 resource categories/levels)  
Workstream 3: Business Consulting/Change Management (5 resource categories/levels)  
Workstream 4: Specialized Consulting (4 resource categories/levels)

PWGSC intends to issue one (1) Contract per each workstream for the required services to be provided as a result of this solicitation. However, Bidders may submit a bid for one or more of the workstreams, as identified within the Request for Proposal.

#### 1.2.2 Period of Contract

This bid solicitation is being issued to satisfy the requirements of PWGSC. It is intended to result in the award of one (1) Contract per each workstream. In the event that a Bidder wants to bid on more than one workstream, a separate technical and financial bid should be submitted for each workstream. Each contract will be for three (3) years and, if required by Canada, one irrevocable option of one (1) year allowing Canada to extend the term of the contract, under the same conditions.

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

At the start date of each new contract year (starting with Contract Year 2 and for the whole period of the contract including the option periods), the firm hourly rates detailed in Table 1 – Pricing Schedule will be adjusted annually on the start date of each new Contract Year by the amount established based on the annual average percentage increase (decrease) in the monthly index of the Consumer Price Index (CPI) for Canada, All-Items (Not Seasonally Adjusted), published in Statistics Canada Catalogue no.62-001-X, Table 5, for the 12-month period ending 2 months prior to the new Contract Year Start date. <https://www150.statcan.gc.ca/n1/daily-quotidien/200819/cq-b001-eng.htm>

#### 1.2.3 Security Requirement

There is a security prerequisite associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, bidders must refer to the Contract Security Program of Public Works and Government Services Canada) <https://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html> website.

#### 1.2.4 Comprehensive Land Claims Settlement Area

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

#### 1.2.5 Federal Contractors Program for Employment Equity

The Federal Contractors Program (FCP) for employment equity applies to this procurement; refer to Part 5 – Certifications and Additional Information, Part 7 - Resulting Contract Clauses and **Attachment 1 to Part 5** – Federal Contractors Program for Employment Equity - Certification.

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#### 1.2.6 epost Connect

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

#### 1.2.7 Phase Bid Compliance Process

The Phased Bid Compliance Process (PBCP) applies to this requirement.

### 1.3 Debriefings

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



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## PART 2 – BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

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

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

The **2003 (2020-05-28)** Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into, and form part of the bid solicitation.

Subsection 5.4 of [2003](#), Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days  
Insert: 180 days

### 2.2 Submission of Bids

Bids must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 in the bid solicitation.

**Note:** For bidders choosing to submit using **epost Connect** for bids closing at the Bid Receiving Unit in the National Capital Region (NCR), the only acceptable email address to use with epost Connect for responses to bid solicitations is:

[tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca](mailto:tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca)

**Interested Bidders must 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.**

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

Bids transmitted by facsimile to PWGSC will not be accepted.

### 2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders 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 bids is completed, Canada will inform the Bidder of a time frame within which to

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provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

### Definitions

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

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

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

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

### Former Public Servant in Receipt of a Pension

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

Yes ( )      No ( )

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

- a. Name of former public servant; and
- b. Date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2019-01](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

### **Work Force Adjustment Directive**

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

Yes ( )      No ( )

If so, the Bidder must provide the following information:

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

### **2.4 Inquiries - Bid Solicitation**

All enquiries must be submitted in writing to the Contracting Authority **no later than seven (7) calendar days before the bid closing date.** Enquiries received after that time may not be answered.

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

### **2.5 Applicable Laws**

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

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

### **2.6 Improvement of Requirement During Solicitation Period**

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline and justify the suggested improvements. Suggestions that do not restrict the level of competition nor favour a particular Bidder will be given consideration provided they are submitted

to the Contracting Authority at least seven (7) calendar days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

## 2.7 Bid Challenge and Recourse Mechanisms

- a. Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.
- b. Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:
  - Office of the Procurement Ombudsman (OPO)
  - Canadian International Trade Tribunal (CITT)
- c. Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.

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## PART 3 – BID PREPARATION INSTRUCTIONS

### 3.1 Bid Preparation Instructions

#### (a) Epost Connect Bid Submission

- (i) If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 standard instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.
- (ii) The bid must be gathered per section and separated as follows:
  - Section I: Technical Bid
  - Section II: Indigenous Participation Plan
  - Section III: Financial Bid (**ATTACHMENT 1 TO PART 3** Table 1 Basis of Pricing)
  - Section IV: Certifications
  - Section V: Additional Information
- (iii) **Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.**

#### (b) Hard copies Bid Submission

- (i) If the Bidder chooses to submit its bid in hard copies, Canada requests that the Bidder submits its bid in separately bound sections as follows:
  - Section I: Technical Bid (5 hard copies)
  - Section II: Indigenous Participation Plan (5 hard copies)
  - Section III: Financial Bid (1 hard copy)
  - Section IV: Certifications (1 hard copy)
  - Section V: Additional Information (1 hard copy)
- (ii) If the Bidder is simultaneously providing copies of its bid 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 have priority over the wording of the other copies.
- (iii) **Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.**

#### (c) **Format for Bid:** Canada requests that Bidders follow the format instructions described below in the preparation of their bid.

- (i) Use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (ii) Use a numbering system that corresponds to the bid solicitation;

(d) **Canada's Policy on Green Procurement:** In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process. See the Policy on Green Procurement (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573>). To assist Canada in reaching its objectives, Bidders should:

- (i) Use paper containing fibre certified as originating from a sustainably-managed forest and/or containing a minimum of 30% recycled content; and
- (ii) Use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, and using staples or clips instead of cerlox, duotangs or binders.

### 3.2 Section I: Technical Bid

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

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

Evaluation Criteria: Each workstream will be evaluated independently.

Substantiation of Technical Compliance for each workstream:

A- **Mandatory Technical Criteria:** The technical bid must substantiate its compliance with the specific articles of **Attachment 2 to Part 4**, Table 1, which is the requested format for providing the substantiation.

B- **Point-Rated Technical Criteria:** The technical bid must substantiate its compliance with the specific articles of **Attachment 2 to Part 4**, Table 2, which is the requested format for providing the substantiation.

### 3.3 Section II: Indigenous Participation Plan

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

### 3.4 Section III: Financial Bid

**Each workstream will be evaluated independently.**

- 3.4.1 Bidders must submit, their Financial Bid in Canadian funds and in accordance with the Pricing Schedule detailed in **Attachment 1 to Part 3**, Table 1.

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

3.4.3 When preparing their Financial Bid, bidders should review clause 4.3, Financial Evaluation, of Part 4 of the bid solicitation; and article 7, Method of Payment – Authorized TA, of Part 7 of the bid solicitation.

3.4.4 Electronic Payment of Invoices - Bid

Canada requests that bidders:

1. Select option 1 or, as applicable, option 2 below; and
2. Include the selected option in Section II of their bid.

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

Option 1:

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

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

Option 2:

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

3.4.5 Exchange Rate Fluctuation

The requirement does not offer exchange rate fluctuation risk mitigation. Requests for exchange rate fluctuation risk mitigation will not be considered. All bids including such provision will render the bid non-responsive.

**3.5 Section IV: Certifications**

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

**3.6 Section V: Additional Information**

In Section V of their bid, bidders **must** provide:

1. Their legal name;
2. Their Procurement Business Number (PBN);
3. The name, mailing address, phone number, facsimile numbers, and email address of the contact person authorized by the Bidder to enter into communications with Canada with regard to their bid, and any contract that may result from their bid;
4. For Part 2, Article 3, Former Public Servant, of the bid solicitation: the required answer to each question, and if the answer is yes, the required information;

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5. For Part 6, Article 1, Security Requirement, of the bid solicitation:

- a. The name of each individual who will require access to classified or protected information, assets or sensitive work sites; and (include Date of Birth and/or Security ID number)
- b. For each proposed location of work performance, the address containing the information below:

Street Number / Street Name, Unit / Suite / Apartment Number  
City, Province, Territory / State  
Postal Code / Zip Code  
Country

6. Bidders who bid as a joint venture must indicate clearly that it is a joint venture and provide the following information

- a. The name of each member of the joint venture;
- b. The Procurement Business Number (PBN) 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; and
- d. The name of the joint venture, if applicable.



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## ATTACHMENT 1 TO PART 3 PRICING SCHEDULE

The Pricing Schedule is divided into four (4) workstreams. The Bidder may submit pricing on one (1) or more of the workstreams. Each workstream will be evaluated independently based on its total cost for 3 years identified in the financial bid. The Bidder must clearly indicate which stream the financial bid belongs to.

The Bidder **must** select and complete the pricing schedule of the workstream(s) chosen and also include it in its financial bid(s), its quoted all-inclusive fixed hourly rate (in Can \$) for each of the resource categories and levels identified.

Firm All-inclusive Hourly Rate (including profit, overhead expenses such as administrative support, facsimile, courier, photocopying, mail, word processing, office supplies, other operating costs and any time spent travelling from the specified individual's work location to a specific pre-authorized work assignment in Canadian funds. Firm All-inclusive Hourly Rate will be used as the basis of payment for each task authorization. The Contractor will be paid firm rates as follows, for work performed in accordance with the Contract. Applicable Taxes are extra.

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

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

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

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**ATTACHMENT 1 TO PART 3  
TABLE 1  
PRICING SCHEDULE**

**Workstream 1  
Real Property Project Management Services**

#	Resource Category	Level of Expertise	Estimated Level of Effort (Hours)		(C) FIRM HOURLY RATE	(D) TOTAL ESTIMATED COST = (A+B) x C
			(A) INITIAL CONTRACT PERIOD (Years 1 to 3)	(B) OPTION CONTRACT PERIOD (Year 4)		
1	Portfolio Planner for Real Property	Senior	5,000	50	\$	\$
2	Project Administrator for Real Property	Intermediate	5,000	50	\$	\$
3	Project Leader for Real Property	Senior	20,000	100	\$	\$
4	Project Leader / Executive for Real Property	Senior	2,500	50	\$	\$
5	Project Manager for Real Property	Senior	70,000	200	\$	\$
6	Project Manager for Real Property	Intermediate	50,000	200	\$	\$
7	Project Manager for Real Property	Junior	15,000	100	\$	\$
8	Project Planner for Real Property	Senior	10,000	100	\$	\$
9	Project Scheduler for Real Property	Senior	500	50	\$	\$
10	Technical Writer for Real Property	Senior	500	50	\$	\$
<b>TOTAL BID PRICE FOR EVALUATION (BIDDER'S EVALUATED PRICE) = (E)</b>						<b>\$</b>

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## Workstream 2 Project Finance and Performance Management

#	Resource Category	Level of Expertise	Estimated Level of Effort (Hours)		(C) FIRM HOURLY RATE	(D) TOTAL ESTIMATED COST = (A+B) x C
			(A) INITIAL CONTRACT PERIOD (Years 1 to 3)	(B) OPTION CONTRACT PERIOD (Year 4)		
11	Claims Analyst	Senior	1,000	30	\$	\$
12	Financial/Cost Specialist	Senior	10,000	30	\$	\$
13	Procurement Specialist	Senior	2,500	30	\$	\$
14	Quality Assurance/Management Specialist	Senior	1,000	30	\$	\$
15	Risk Management Specialist	Senior	5,000	30	\$	\$
TOTAL BID PRICE FOR EVALUATION (BIDDER'S EVALUATED PRICE) = (E)						\$

## Workstream 3 Business Consulting and Change Management

#	Resource Category	Level of Expertise	Estimated Level of Effort (Hours)		(C) FIRM HOURLY RATE	(D) TOTAL ESTIMATED COST = (A+B) x C
			(A) INITIAL CONTRACT PERIOD (Years 1 to 3)	(B) OPTION CONTRACT PERIOD (Year 4)		
16	Business Consultant	Senior	10,000	30	\$	\$
17	Change Management Consultant	Senior	5,000	30	\$	\$
18	Communications Consultant	Senior	2,500	30	\$	\$
19	Communications Consultant	Intermediate	4,000	30	\$	\$
20	Organizational Development Consultant	Senior	2,500	30	\$	\$
TOTAL BID PRICE FOR EVALUATION (BIDDER'S EVALUATED PRICE) = (E)						\$

## Workstream 4 Specialized Consulting

#	Resource Category	Level of Expertise	Estimated Level of Effort (Hours)		(C) FIRM HOURLY RATE	(D) TOTAL ESTIMATED COST = (A+B) x C
			(A) INITIAL CONTRACT PERIOD (Years 1 to 3)	(B) OPTION CONTRACT PERIOD (Year 4)		
21	Professional Architectural/Engineering Consultant	Senior	500	15	\$	\$
22	Project Manager for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields	Senior	1,000	15	\$	\$
23	Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields	Senior	4,000	15	\$	\$
24	Project Manager for Real Property with Technical Expertise in High-Level Security Requirements	Senior	5,000	15	\$	\$
<b>TOTAL BID PRICE FOR EVALUATION (BIDDER'S EVALUATED PRICE) = (E)</b>						\$

The following applies to each of the workstreams listed above:

IN THE CASE OF ERROR IN THE EXTENSION OF PRICES, THE UNIT PRICE WILL GOVERN.  
CANADA MAY ENTER INTO CONTRACT WITHOUT NEGOTIATION.

*Note 1: In order to ensure that fair and competitive rates are received, the following requirement must be strictly adhered to: bidders must submit an hourly rate for each listed category/level. The hourly rate for any given category cannot be \$0 or nil value.*

*Note 2: Disbursements - separate billing of any items related to the routine cost of doing business or time spent travelling will not be permitted under any resulting contract.*

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## **ESCALATION CLAUSE**

The firm hourly rates detailed in Table 1 – Pricing Schedule above, will be adjusted annually on the start date of each new Contract Year (starting with Contract Year 2 and for the whole period of the contract including the option periods) by the amount established based on the annual average percentage increase (decrease) in the monthly index of the Consumer Price Index for Canada (CPI), All-Items (Not Seasonally Adjusted), published in Statistics Canada Catalogue no.62-001-X, Table 5, for the 12-month period ending 2 months prior to the new Contract Year Start date. <https://www150.statcan.gc.ca/n1/daily-quotidien/200819/cg-b001-eng.htm>

Example:

Contract Start Date: March 1, 2018

At the start of Contract Year 2 (i.e. March 1, 2019), the Contract Year 1 rates as stated in Table 1 Pricing Schedule would be increased by 1.11% based on the following assumptions:

		% Change in Monthly CPI
January	2018	1.1%
February	2018	1.6%
March	2018	1.3%
April	2018	1.3%
May	2018	1.1%
June	2018	1.1%
July	2018	1.5%
August	2018	0.9%
September	2018	0.6%
October	2018	1.3%
November	2018	0.6%
December	2018	0.9%

$$13.3\% / 12 \text{ months} = 1.11\%$$

To determine the Contract Year 3 rates, the Contract Year 2 rates calculated above would be adjusted using the same Statistics Canada Table and same formula with data for the January 2019 – December 2019 12-month period.

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## PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

**Each workstream will be assessed independently.**

1. Each Bid will be assessed in accordance with its requirement of the bid solicitation including its technical and financial evaluation criteria.
2. An evaluation team composed of representatives of Canada will evaluate the bids.
3. Canada will use the Phased Bid Compliance Process (PBCP) described below for Workstream 1 – Real Property Project Management Services, Workstream 2- Project Finance and Performance Management, Workstream 3 – Business Consulting and Change Management and Workstream 4 - Specialized Consulting.

#### 4.1.1 Phased Bid Compliance Process

##### 4.1.1.1 (2018-07-19) General

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

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

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

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

- (c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative. These include without limitation: failure to sign any part of the Bid, checkmark a box in a form, failure of format or within the form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers, and inadvertent errors in numbers or calculations that do not change the amount that the Bidder has specified as the price, or of any component thereof

that is subject to evaluation. This will not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.

- (d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2020-05-28) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).
- (e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

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

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

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additional information or clarification in response to the Notice. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the Notice.

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

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

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



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

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

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

## 4.2 Technical Evaluation

A separate technical evaluation will be conducted for each workstream.

PWGSC reserves the right to verify information for completeness and accuracy and to confirm reference satisfaction with services provided. The evidence provided by the Bidder may be verified by the Crown. Failure by the Bidder to provide the required evidence or in the event where the evidence cannot be verified or the service found to be unsatisfactory, the bid will be considered non-responsive and no further consideration will be given to the Bidder.

### 4.2.1 Joint Venture Experience

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

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

- b) A Joint Venture Bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

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

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

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

- Contracts all signed by A; or
- Contracts all signed by B; or
- Contracts all signed by A and B in joint venture; or
- Contracts signed by A and contracts signed by A and B in joint venture; or
- Contracts signed by B and contracts signed by A and B in joint venture,

that show in total a minimum of 100 billable days.

- d) Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the bid solicitation period.

#### 4.2.2 Flexible Grid

Refer to **Attachment 1 to Part 4**.

#### 4.2.3 Mandatory Technical Criteria (MT)

Refer to **Attachment 2 to Part 4** – Table 1. Mandatories are listed for each of the workstreams.

The Phased Bid Compliance Process (PBCP) will apply to all mandatory technical criteria in all the workstreams.

#### 4.2.4 Point Rated Technical Criteria (RT)

Refer to **Attachment 2 to Part 4** – Table 2. Point-rated technical criteria not addressed will be given a score of zero. Point-rated technical criteria are listed for each of the workstreams.

#### 4.2.5 Reference Checks

Reference checks for the purpose of this evaluation are used to verify and validate the Bidder's response. Canada reserves the rights to validate the information provided by the bidder by contacting the references provided by the bidder.

It is the sole responsibility of the Bidder to ensure that it provides a contact that is knowledgeable about the services the Bidder has provided to its customer and who is willing to act as a customer reference.

#### 4.2.6 Indigenous Participation Plan

Refer to **Attachment 3 to Part 4**, INDIGENOUS PARTICIPATION PLAN (IPP)

### 4.3 Financial Evaluation

Bidders must complete and submit a Financial Bid in response to this RFP for the workstream(s) for which they are bidding. Upon completion of the technical evaluation of each workstream, and only for the technically responsive bids, the financial bid(s) of each workstream will be evaluated independently.

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

#### 4.3.1 Conduct of Financial Evaluation

PWGSC will conduct the financial evaluation, for each workstream, based on the methodology detailed below:

- (a) For the technically responsive Bidder, the financial bids submitted for each workstream(s) will be assessed independently. All financial evaluations will be based on firm hourly rates for each workstream selected.
- (b) The following step will be taken for each specific workstream of Resource Categories:
  - (i) The firm hourly rates of all resources (under categories of *Junior*, *Intermediate* and/or *Senior*) will be multiplied with the level of effort (hours) for all 4 years (initial contract period of 3 years plus the option year 1 period of 1 year) to obtain a Total Estimated Cost.
  - (ii) Only firm hourly rates proposed for all resources (under categories of *Junior*, *Intermediate* and/or *Senior*), for all 4 years, will be used to calculate the Total Bid Price for evaluation (**Bidder's evaluated price**) for that workstream, by adding all the Total estimated costs together for all the resources.

#### 4.4 Basis of Selection

**The following selection process will be conducted for each workstream:**

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

Note to Bidders - if a bidder is selected for award of more than one workstream, Canada will award one contract for each of the workstream awarded to that bidder.

##### 4.4.1 To be declared responsive, a bid must:

- a) Comply with all the requirements of the bid solicitation;
- b) Meet all the mandatory technical evaluation criteria (**Attachment 2 of Part 4**, Table 1); and
- c) Obtain the required minimum number of points for the Point Rated Technical Criteria – Written (RTW), applies to the sum of the written technical proposal, as specified in **Attachment 2 to Part 4** – Table 2- Technical Criteria.

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

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

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- 4.4.4 A technical merit score (TMS), determined as follows, will be allocated to each responsive bid (i):  $TMS_i = OS_i \times 65$ .  $OS_i$  is the overall score (OS) obtained by each responsive bid (i) for all the point rated technical criteria specified in **Attachment 1 to Part 4**, determined as follows: total number of points obtained / maximum number of points available.
- 4.4.5 In addition, the IPP is worth 5% and will then be added to the combined rating.
- 4.4.6 The overall Technical and Financial Score (OTFS) is determined as follows:  
 $OTFS = PS_i + TMS_i + IPP$ .
- 4.4.7 The responsive bid with the highest combined rating of technical merit, price and Indigenous Participation Plan (IPP) will be recommended for award of a contract. In the event two or more responsive bids have the same highest combined rating of technical merit, Price and IPP, the responsive bid that obtained the highest overall score for the combination of the IPP and the point rated technical criteria detailed in **Attachment 2 to Part 4**, Table 1 and Table 2, will be recommended for award of a contract.

4.4.8 The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 65/30/5 ratio of the technical merit, price, and the IPP respectively.

The example below can be applied to each workstream in the RFP. For the purpose of providing an example, the table below refers to Workstream 1 - Real Property Project Management Services and its allocated technical points.

Basis of Selection – Highest Combined Rating of: Technical Merit (65%) Price (30%) and Indigenous Participation Plan (IPP) (5%)			
Bidder on Workstream 1	Bidder 1	Bidder 2	Bidder 3
Overall Score for All the Point Rated Technical Criteria	OS1: 240/295	OS2: 248/295	OS3: 205/295
Bid Evaluated Price	P1: C\$17,000,000	P2: C\$17,500,000	LP and P3: C\$15,500,000
Indigenous Participation Plan (IPP)	3.75	0	5
Calculations	Technical Merit Score (OSi x 65 = TMSi)	Pricing Score (LP/Pi x 30 = PSi)	Overall Technical and Financial Score (OTFS) (TMSi + PSi + IPP= OTFS)
Bidder 1	240/295 x 65 = 52.88	155/170 x 30 = 27.35	(52.88 + 27.35 + 3.75) = <b>83.98*</b>
Bidder 2	248/295 x 65 = 54.64	155/175 x 30 = 26.57	(54.64 + 26.57 + 0) = <b>81.21</b>
Bidder 3	205/295 x 65 = 45.17	155/155 x 30 = 30	(45.17 + 30.00 + 5) = <b>80.17</b>

\* Bidder 1 achieved the highest combined rating between technical merit, price, and IPP; as a result, it would be recommended for the contract award.

**Note 1 - For each workstream, the highest combined rating will be calculated separately.**

**Note 2 - A passing mark of 70%** applies to the sum of the written technical proposal (Point Rated Technical Criteria – Written).

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## **ATTACHMENT 1 TO PART 4 FLEXIBLE GRID**

**The Flexible Grid applies to all the 4 workstreams.**

### **Flexible Grid – Resources**

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

### **Experience**

The experience must be demonstrated and be directly related to each resource category, as identified in the workstream(s).

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

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

### **Education**

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

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

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

### **Relevant Professional Certification**

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

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

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- Projects IN Controlled Environments (PRINCE2)
  - Project Management Professional (PMP)
  - Program Management Professional (PgMP)
  - Portfolio Management Professional (PfMP)
  - Certified Associate in Project Management (CAPM)
  - Professional Management Institute Professional in Business Analysis (PMI-PBA)
  - Professional Management Institute Agile Certified Practitioner (PMI-ACP)
  - Professional Management Institute Risk Management Professional (PMI-RMP)
  - Professional Management Institute Scheduling Professional (PMI-SP)

### How to use the Flexible Grid

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

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

Also, if needed, PWGSC has the discretion to add mandatory requirements for the type and years of education, certification or experience. The Bidder must then propose a resource meeting PWGSC's requirement.

PWGSC will have the responsibility to assess if the education, certification, and experience are related to the resource category.

Only the resources identified in **Attachment 1 to Part 4** – Table 1 and **Attachment 2 to Part 4** - Tables 1 and 2 will be evaluated as part of this bid solicitation.

The flexible grid to be used is the following:

**Note - Bid evaluation will be on only one (1) proposed resource per category/level.**



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**ATTACHMENT 1 TO PART 4  
TABLE 1  
FLEXIBLE GRID – RESOURCES**

**Workstream 1  
Real Property Project Management Services**

#	Category (Required or Optional)	Level	Language of Work	Name	Relevant Education	Professional Certification	Relevant Experience	Total Score	Minimum Points
1	Portfolio Planner for Real Property	Senior	English						100 pts
2	Project Administrator for Real Property	Intermediate	English						70 pts
3	Project Leader for Real Property	Senior	English						100 pts
4	Project Leader / Executive for Real Property	Senior	English						100 pts
5	Project Manager for Real Property	Senior	English						100 pts
6	Project Manager for Real Property	Intermediate	English						80 pts
7	Project Manager for Real Property	Junior	English						65 pts
8	Project Planner for Real Property	Senior	English						95 pts
9	Project Scheduler for Real Property	Senior	English						70 pts
10	Technical Writer for Real Property	Senior	English						95 pts

**Workstream 2  
Project Finance and Performance Management**

#	Category (Required or Optional)	Level	Language of Work	Name	Relevant Education	Professional Certification	Relevant Experience	Total Score	Minimum Points
11	Claims Analyst	Senior	English						95 pts
12	Financial/Cost Specialist	Senior	English						100 pts
13	Procurement Specialist	Senior	English						95 pts
14	Quality Assurance/Management Specialist	Senior	English						95 pts
15	Risk Management Specialist	Senior	English						95 pts

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### Workstream 3 Business Consulting and Change Management

#	Category (Required or Optional)	Level	Language of Work	Name	Relevant Education	Professional Certification	Relevant Experience	Total Score	Minimum Points
16	Business Consultant	Senior	English						95 pts
17	Change Management Consultant	Senior	English						95 pts
18	Communications Consultant	Senior	English						95 pts
19	Communications Consultant	Intermediate	English						70 pts
20	Organizational Development Consultant	Senior	English						95 pts

### Workstream 4 Specialized Consulting

#	Category (Required or Optional)	Level	Language of Work	Name	Relevant Education	Professional Certification	Relevant Experience	Total Score	Minimum Points
21	Professional Architectural/Engineering Consultant	Senior	English						95 pts
22	Project Manager for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields	Senior	English						100 pts
23	Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields	Senior	English						100 pts
24	Project Manager for Real Property with Technical Expertise in High-Level Security Requirements	Senior	English						100 pts

## **FLEXIBLE GRIDS BY RESOURCE CATEGORY PER WORKSTREAM**

Bid evaluation will be on only one (1) proposed resource per category/level.

The Flexible Grids for each resource category are the following:

### **WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES**

#### **1. Portfolio Planner for Real Property - Senior**

##### **Levels of Expertise**

*Senior:* Minimum 100 pts

##### **Relevant Education to the Resource Category**

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

College or CEGEP Diploma/Certificate: 25 pts

##### **Professional Certification**

Relevant Professional Certification: 15 pts

##### **Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 15 pts

≥2 yrs and <4 yrs: 24–47 months — 25 pts

≥4 yrs and <6 yrs: 48–71 months — 35 pts

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

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

≥10 yrs: 120 + months — 65 pts

#### **2. Project Administrator for Real Property - Intermediate**

##### **Levels of Expertise**

*Intermediate:* Minimum 70 pts

##### **Relevant Education to the Resource Category**

College or CEGEP Diploma / Certificate: 35 pts

##### **Professional Certification**

Relevant Professional Certification: 15 pts

##### **Relevant Experience in Resource Category**

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

≥2 yrs and <4 yrs: 24-47 months - 25 pts

≥4 yrs and <6 yrs: 48-71 months - 35 pts

≥6 yrs and <8 yrs: 72-95 months - 40 pts

≥8 yrs and <10 yrs: 96-119 months - 45 pts

≥10 yrs: 120 + months - 50 pts

#### **3. Project Leader for Real Property - Senior**

##### **Levels of Expertise**

*Senior:* Minimum 100 pts

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**Relevant Education to the Resource Category**

University (PhD, Graduate, Undergraduate, degree): 35 pts  
College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 10 pts  
≥2 yrs and <4 yrs: 24–47 months — 20 pts  
≥4 yrs and <6 yrs: 48–71 months — 30 pts  
≥6 yrs and <8 yrs: 72–95 months — 35 pts  
≥8 yrs and <10 yrs: 96–119 months — 55 pts  
≥10 yrs: 120 + months — 65 pts

**4. Project Leader / Executive for Real Property - Senior**

**Levels of Expertise**

*Senior:* Minimum 100 pts

**Relevant Education to the Resource Category**

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

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12-23 months - 10 pts  
≥2 yrs and <4 yrs: 24-47 months - 20 pts  
≥4 yrs and <6 yrs: 48-71 months - 30 pts  
≥6 yrs and <8 yrs: 72-95 months - 35 pts  
≥8 yrs and <10 yrs: 96-119 months - 55 pts  
≥10 yrs: 120 + months - 65 pts

**5. Project Manager for Real Property - Senior**

**6. Project Manager for Real Property - Intermediate**

**7. Project Manager for Real Property - Junior**

**Levels of Expertise**

*Senior:* Minimum 100 pts

*Intermediate:* Minimum 80 pts

*Junior:* Minimum 65 pts

**Relevant Education to the Resource Category**

University (PhD, Graduate, Undergraduate, degree): 35 pts  
College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 15 pts  
≥2 yrs and <4 yrs: 24–47 months — 20 pts  
≥4 yrs and <6 yrs: 48–71 months — 30 pts  
≥6 yrs and <8 yrs: 72–95 months — 35 pts  
≥8 yrs and <10 yrs: 96–119 months — 55 pts  
≥10 yrs: 120 + months — 65 pts

**8. Project Planner for Real Property - Senior**

**Levels of Expertise**

*Senior:* Minimum 95 pts

**Relevant Education to the Resource Category**

University (PhD, Graduate, Undergraduate, degree): 35 pts  
College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 10 pts  
≥2 yrs and <4 yrs: 24–47 months — 20 pts  
≥4 yrs and <6 yrs: 48–71 months — 25 pts  
≥6 yrs and <8 yrs: 72–95 months — 35 pts  
≥8 yrs and <10 yrs: 96–119 months — 50 pts  
≥10 yrs: 120 + months — 60 pts

**9. Project Scheduler for Real Property – Senior**

**Levels of Expertise**

*Senior:* Minimum 95 pts

**Relevant Education to the Resource Category**

College or CEGEP Diploma / Certificate: 35 pts

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 10 pts  
≥2 yrs and <4 yrs: 24–47 months — 20 pts  
≥4 yrs and <6 yrs: 48–71 months — 25 pts  
≥6 yrs and <8 yrs: 72–95 months — 35 pts  
≥8 yrs and <10 yrs: 96–119 months — 50 pts  
≥10 yrs: 120 + months — 60 pts

**10. Technical Writer for Real Property – Senior**

**Levels of Expertise**

*Senior:* Minimum 95 pts

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**Relevant Education to the Resource Category**

University (PhD, Graduate, Undergraduate, degree): 35 pts  
College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 10 pts  
≥2 yrs and <4 yrs: 24–47 months — 20 pts  
≥4 yrs and <6 yrs: 48–71 months — 25 pts  
≥6 yrs and <8 yrs: 72–95 months — 35 pts  
≥8 yrs and <10 yrs: 96–119 months — 50 pts  
≥10 yrs: 120 + months — 60 pts

**WORKSTREAM 2 - PROJECT FINANCE AND PERFORMANCE MANAGEMENT****11. Claims Analyst - Senior****Levels of Expertise**

*Senior:* Minimum 95 pts

**Relevant Education to the Resource Category**

University (PhD, Graduate, Undergraduate, degree): 35 pts  
College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 10 pts  
≥2 yrs and <4 yrs: 24–47 months — 20 pts  
≥4 yrs and <6 yrs: 48–71 months — 25 pts  
≥6 yrs and <8 yrs: 72–95 months — 35 pts  
≥8 yrs and <10 yrs: 96–119 months — 50 pts  
≥10 yrs: 120 + months — 60 pts

**12. Financial/Cost Specialist - Senior****Levels of Expertise**

*Senior:* Minimum 100 pts

**Relevant Education to the Resource Category**

University (PhD, Graduate, Undergraduate, degree): 35 pts  
College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 20 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 10 pts  
≥2 yrs and <4 yrs: 24–47 months — 20 pts  
≥4 yrs and <6 yrs: 48–71 months — 30 pts  
≥6 yrs and <8 yrs: 72–95 months — 45 pts  
≥8 yrs and <10 yrs: 96–119 months — 55 pts  
≥10 yrs: 120 + months — 65 pts

**13. Procurement Specialist - Senior**

**Levels of Expertise**

*Senior:* Minimum 95 pts

**Relevant Education to the Resource Category**

University (PhD, Graduate, Undergraduate, degree): 35 pts  
College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 15 pts  
≥2 yrs and <4 yrs: 24–47 months — 25 pts  
≥4 yrs and <6 yrs: 48–71 months — 35 pts  
≥6 yrs and <8 yrs: 72–95 months — 45 pts  
≥8 yrs and <10 yrs: 96–119 months — 55 pts  
≥10 yrs: 120 + months — 65 pts

**14. Quality Assurance /Management Specialist - Senior**

**Levels of Expertise**

*Senior:* Minimum 95 pts

**Relevant Education to the Resource Category**

University (PhD, Graduate, Undergraduate, degree): 35 pts  
College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 10 pts  
≥2 yrs and <4 yrs: 24–47 months — 20 pts  
≥4 yrs and <6 yrs: 48–71 months — 25 pts  
≥6 yrs and <8 yrs: 72–95 months — 35 pts  
≥8 yrs and <10 yrs: 96–119 months — 50 pts  
≥10 yrs: 120 + months — 60 pts

**15. Risk Management Specialist - Senior**

**Levels of Expertise**

*Senior:* Minimum 95 pts

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**Relevant Education to the Resource Category**

University (PhD, Graduate, Undergraduate, degree): 35 pts  
College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 10 pts  
≥2 yrs and <4 yrs: 24–47 months — 20 pts  
≥4 yrs and <6 yrs: 48–71 months — 25 pts  
≥6 yrs and <8 yrs: 72–95 months — 35 pts  
≥8 yrs and <10 yrs: 96–119 months — 50 pts  
≥10 yrs: 120 + months — 60 pts

**WORKSTREAM 3 - BUSINESS CONSULTING AND CHANGE MANAGEMENT**

**16. Business Consultant – Senior**

**Levels of Expertise**

*Senior:* Minimum 95 pts

**Relevant Education to the Resource Category**

University (PhD, Graduate, Undergraduate, degree): 35 pts  
College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 10 pts  
≥2 yrs and <4 yrs: 24–47 months — 20 pts  
≥4 yrs and <6 yrs: 48–71 months — 25 pts  
≥6 yrs and <8 yrs: 72–95 months — 35 pts  
≥8 yrs and <10 yrs: 96–119 months — 50 pts  
≥10 yrs: 120 + months — 60 pts

**17. Change Management Consultant – Senior**

**Levels of Expertise**

*Senior:* Minimum 95 pts

**Relevant Education to the Resource Category**

University (PhD, Graduate, Undergraduate, degree): 35 pts  
College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 15 pts



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**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12-23 months - 10 pts  
≥2 yrs and <4 yrs: 24-47 months - 20 pts  
≥4 yrs and <6 yrs: 48-71 months - 25 pts  
≥6 yrs and <8 yrs: 72-95 months - 35 pts  
≥8 yrs and <10 yrs: 96-119 months - 50 pts  
≥10 yrs: 120 + months - 60 pts

**18. Communications Consultant – *Senior***

**19. Communications Consultant – *Intermediate***

**Levels of Expertise**

*Senior*: Minimum 95 pts

*Intermediate*: Minimum 70 pts

**Relevant Education to the Resource Category**

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

College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 10 pts  
≥2 yrs and <4 yrs: 24–47 months — 20 pts  
≥4 yrs and <6 yrs: 48–71 months — 25 pts  
≥6 yrs and <8 yrs: 72–95 months — 35 pts  
≥8 yrs and <10 yrs: 96–119 months — 50 pts  
≥10 yrs: 120 + months — 60 pts

**20. Organizational Development Consultant – *Senior***

**Levels of Expertise**

*Senior*: Minimum 95 pts

**Relevant Education to the Resource Category**

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

College or CEGEP Diploma/Certificate: 25 pts

**Professional Certification**

Relevant Professional Certification: 15 pts

**Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12-23 months - 10 pts  
≥2 yrs and <4 yrs: 24-47 months - 20 pts  
≥4 yrs and <6 yrs: 48-71 months - 25 pts  
≥6 yrs and <8 yrs: 72-95 months - 35 pts  
≥8 yrs and <10 yrs: 96-119 months - 50 pts  
≥10 yrs: 120 + months - 60 pts

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## **WORKSTREAM 4 - SPECIALIZED CONSULTING**

### **21. Professional Architectural/Engineering Consultant – *Senior***

#### **Levels of Expertise**

*Senior*: Minimum 95 pts

#### **Relevant Education to the Resource Category**

University (PhD, Graduate, Undergraduate, degree): 30 pts

#### **Professional Certification**

Additional Relevant Professional Certification: 10 pts

#### **Relevant Experience in Resource Category**

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

≥2 yrs and <4 yrs: 24-47 months - 25 pts

≥4 yrs and <6 yrs: 48-71 months - 35 pts

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

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

≥10 yrs: 120 + months - 65 pts

- 22. Project Manager for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields - *Senior***
- 23. Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields - *Senior***
- 24. Project Manager for Real Property with Technical Expertise in High-Level Security Requirements - *Senior***

#### **Levels of Expertise**

*Senior*: Minimum 100 pts

#### **Relevant Education to the Resource Category**

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

#### **Professional Certification**

Relevant Professional Certification: 15 pts

#### **Relevant Experience in Resource Category**

≥1 yr and <2 yrs: 12–23 months — 15 pts

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

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

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

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

≥10 yrs: 120 + months — 65 pts

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## ATTACHMENT 2 TO PART 4 TECHNICAL CRITERIA

### **FLEXIBLE GRIDS BY RESOURCE CATEGORY PER WORKSTREAM**

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

#### **Interpretation of the Requirements by the Evaluation Team**

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

7. Phrases such as "experience working as a Project Manager" (or other resource category title) mean that the experience must match, to the satisfaction of the evaluation team, the requirements for such a resource category as stated in the Statement of Work provided with this RFP.
8. Phrases such as "experience dealing with matters related to the Statement of Work" mean that the experience must match, to the satisfaction of the evaluation team, the nature of the requirements for the work being done by PWGSC as described throughout the Statement of Work, including but not limited to background and introductory and other descriptive information.
9. The Bidder may NOT propose the same individual for more than one (1) of the Resource Category/Level.
10. Definitions:  
  
    **"Federal"** means working within the legislative framework of the Canadian federal government.  
  
    **"Public sector"** means municipal and/or provincial and/or federal government.

## 1. **MANDATORY TECHNICAL CRITERIA**

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

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

**PBCP applies to all mandatories in all the workstreams.**

**NOTE: MT1 and MT2 apply to ALL four (4) workstreams.**

ATTACHMENT 2 TO PART 4			
TABLE 1			
MANDATORY TECHNICAL CRITERIA (MT)			
#	Description	Met/Not Met	Substantiation Page Number
MT1	The Bidder must submit information related to three (3) projects that have been completed by the Bidder within the last fifteen (15) years prior to the solicitation closing date, or that a minimum have attained substantial completion of construction within the last fifteen (15) years, prior to the solicitation closing date if contracts are not fully invoiced. Minimum duration for each project has to be two (2) continuous years or more. Joint venture submissions are not to exceed the maximum number of projects. Only the first three (3) projects listed in sequence will receive consideration.		

#	Description	Met/Not Met	Substantiation Page Number																
MT2	<p>It is a mandatory requirement that the Bidder meet the minimum requirements of the flexible grid.</p> <p>a) The Bidder must submit resumes for ALL resource categories and levels listed in <b>ATTACHMENT 1 TO PART 4, TABLE 1, Flexible Grid – Resources.</b></p> <p>b) In order to obtain points for education and professional accreditations, the Bidder must include photocopies of certificates for ALL resource categories and levels listed in <b>ATTACHMENT 1 TO PART 4, TABLE 1, Flexible Grid – Resources.</b></p> <p>Any individual may be proposed for no more than ONE (1) Resource Category/Level.</p>																		
MT3	<p>a) Each proposed resource must meet the minimum educational requirement according to the relevant resource category and level as listed in the following table:</p> <table><tr><th colspan="2">WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES</th></tr><tr><th>Resource Category and Level</th><th>Minimum Education Required</th></tr><tr><td>Portfolio Planner for Real Property Senior</td><td>College Diploma</td></tr><tr><td>Project Administrator For Real Property Intermediate</td><td>College Diploma</td></tr><tr><td>Project Leader for Real Property Senior</td><td>College Diploma</td></tr><tr><td>Project Leader / Executive for Real Property Senior</td><td>University Degree</td></tr><tr><td>Project Manager for Real Property Senior</td><td>College Diploma</td></tr><tr><td>Project Manager for Real Property Intermediate</td><td>College Diploma</td></tr></table>	WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES		Resource Category and Level	Minimum Education Required	Portfolio Planner for Real Property Senior	College Diploma	Project Administrator For Real Property Intermediate	College Diploma	Project Leader for Real Property Senior	College Diploma	Project Leader / Executive for Real Property Senior	University Degree	Project Manager for Real Property Senior	College Diploma	Project Manager for Real Property Intermediate	College Diploma		
WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES																			
Resource Category and Level	Minimum Education Required																		
Portfolio Planner for Real Property Senior	College Diploma																		
Project Administrator For Real Property Intermediate	College Diploma																		
Project Leader for Real Property Senior	College Diploma																		
Project Leader / Executive for Real Property Senior	University Degree																		
Project Manager for Real Property Senior	College Diploma																		
Project Manager for Real Property Intermediate	College Diploma																		

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Buyer ID – Id de l'acheteur  
FK292  
CCC No./N° CCC – FMS No./N° VME

	Project Manager for Real Property <i>Junior</i>	College Diploma		
	Project Planner for Real Property <i>Senior</i>	College Diploma		
	Project Scheduler for Real Property <i>Senior</i>	College Diploma		
	Technical Writer for Real Property <i>Senior</i>	College Diploma		
	<b>WORKSTREAM 2 - PROJECT FINANCE AND PERFORMANCE MANAGEMENT</b>			
	<b>Resource Category and Level</b>	<b>Minimum Education Required</b>	<b>Met/Not Met</b>	<b>Substantiation Page Number</b>
	Claims Analyst <i>Senior</i>	College Diploma		
	Financial/Cost Specialist <i>Senior</i>	College Diploma		
	Procurement Specialist <i>Senior</i>	College Diploma		
	Quality Assurance/Management Specialist <i>Senior</i>	College Diploma		
	Risk Management Specialist <i>Senior</i>	College Diploma		
	<b>WORKSTREAM 3 - BUSINESS CONSULTING AND CHANGE MANAGEMENT</b>			
	<b>Resource Category and Level</b>	<b>Minimum Education Required</b>	<b>Met/Not Met</b>	<b>Substantiation Page Number</b>
	Business Consultant <i>Senior</i>	College Diploma		
	Change Management Consultant <i>Senior</i>	College Diploma		
	Communications Consultant <i>Senior</i>	College Diploma		
	Communications Consultant <i>Intermediate</i>	College Diploma		
	Organizational Development Consultant <i>Senior</i>	College Diploma		

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WORKSTREAM 4 - SPECIALIZED CONSULTING			
Resource Category and Level	Minimum Education Required	Met/Not Met	Substantiation Page Number
<b>Professional Architectural/Engineering Consultant</b> <i>Senior</i>	University Degree		
<b>Project Manager for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields</b> <i>Senior</i>	University Degree		
<b>Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields</b> <i>Senior</i>	University Degree		
<b>Project Manager for Real Property with Technical Expertise in High-Level Security Requirements</b> <i>Senior</i>	University Degree		
b) Bidder must provide photocopies of Diploma/Degree as proof with their bid.			

#	Description	Met/Not Met	Substantiation Page Number
MT4	<p><b>WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES</b></p> <p>The proposed "Project Leader / Executive for Real Property – <i>Senior</i>" must:</p> <ul style="list-style-type: none"> <li>a) Possess a Master's Certificate or Degree in Project Management.</li> <li>b) Be a certified professional engineer or architect in good standing in Canada. Photocopies of certification as proof must be submitted with the bid.</li> <li>c) Possess an active certification in the related discipline.</li> </ul> <p>To demonstrate proof of good standing with a professional order, bidders must provide, in addition to copies of certification, a copy of the resources membership card for the current year or other similar proof.</p>		
MT5	<p><b>WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES</b></p> <p>The proposed "Project Manager for Real Property – <i>Senior</i>" must:</p> <ul style="list-style-type: none"> <li>a) Possess an active certification in the related discipline.</li> </ul> <p>Bidder must provide photocopies of certification as proof with their bid.</p>		
MT6	<p><b>WORKSTREAM 2 - PROJECT FINANCE AND PERFORMANCE MANAGEMENT</b></p> <p>The proposed "Procurement Specialist – <i>Senior</i>" must:</p> <ul style="list-style-type: none"> <li>a) Have experience in writing and delivering, for the federal government, Request for Proposals (RFPs) for at least 3 Projects valued at \$5M or more.</li> </ul>		



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#	Description	Met/Not Met	Substantiation Page Number
MT7	<p><b>WORKSTREAM 2 - PROJECT FINANCE AND PERFORMANCE MANAGEMENT</b></p> <p>The proposed "Risk Management Specialist – <i>Senior</i>" must:</p> <p>a) Have experience in delivering threat and risk assessments in the last ten (10) years prior the solicitation closing date for at least 3 Projects valued at \$5M or more.</p>		
MT8	<p><b>WORKSTREAM 3 - BUSINESS CONSULTING AND CHANGE MANAGEMENT</b></p> <p>The proposed "Business Consultant – <i>Senior</i>" must:</p> <p>a) Possess an active certification in the related discipline.</p> <p>Bidder must provide photocopies of certification as proof with their bid.</p>		
MT9	<p><b>WORKSTREAM 3 - BUSINESS CONSULTING AND CHANGE MANAGEMENT</b></p> <p>The proposed "Organizational Development Consultant – <i>Senior</i>" must:</p> <p>a) Possess an active certification in the related discipline.</p> <p>Bidder must provide photocopies of certification as proof with their bid.</p>		

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#	Description	Met/Not Met	Substantiation Page Number
MT10	<p><b>WORKSTREAM 4 - SPECIALIZED CONSULTING</b></p> <p>The proposed “Professional Architectural/Engineering Consultant – <i>Senior</i>” must:</p> <ul style="list-style-type: none"> <li>a) Have been responsible for developing Architectural/Engineering requirements for at least 3 fit-up projects valued at \$5M or more.</li> <li>b) Be a certified professional engineer or architect in good standing in Canada. Photocopies of certification as proof must be submitted with the bid.</li> <li>c) Possess an active certification in the related discipline.</li> </ul> <p>To demonstrate proof of good standing with a professional order, bidders must provide, in addition to copies of certification, a copy of the resources membership card for the current year or other similar proof.</p>		
MT11	<p><b>WORKSTREAM 4 - SPECIALIZED CONSULTING</b></p> <p>The proposed “<i>Senior</i> Project Manager for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields” must:</p> <ul style="list-style-type: none"> <li>a) Be a certified professional engineer or architect in good standing in Canada. Photocopies of certification as proof must be submitted with the bid.</li> <li>b) Possess an active certification in the related discipline.</li> </ul> <p>To demonstrate proof of good standing with a professional order, bidders must provide, in addition to copies of certification, a copy of the resources membership card for the current year or other similar proof.</p>		

#	Description	Met/Not Met	Substantiation Page Number
MT12	<p><b>WORKSTREAM 4 - SPECIALIZED CONSULTING</b></p> <p>The proposed “<i>Senior Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields</i>” must:</p> <ul style="list-style-type: none"> <li>a) Be a certified professional engineer or architect in good standing in Canada. Photocopies of certification as proof must be submitted with the bid.</li> <li>c) Possess an active certification in the related discipline.</li> </ul> <p>To demonstrate proof of good standing with a professional order, bidders must provide, in addition to copies of certification, a copy of the resources membership card for the current year or other similar proof.</p>		
MT13	<p><b>WORKSTREAM 4 - SPECIALIZED CONSULTING</b></p> <p>The proposed “<i>Senior Project Manager for Real Property with Technical Expertise in High-Level Security Requirements</i>” must:</p> <ul style="list-style-type: none"> <li>a) Have been responsible for developing technical requirements for at least 3 high-security fit-up projects valued at \$5M or more.</li> <li>b) Be a certified professional engineer or architect in good standing in Canada. Photocopies of certification as proof must be submitted with the bid.</li> <li>c) Possess an active certification in the related discipline.</li> <li>d) Possess an active Secret security clearance.</li> </ul> <p>To demonstrate proof of good standing with a professional order, bidders must provide, in addition to copies of certification, a copy of the resources membership card for the current year or other similar proof.</p>		

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## 2. **POINT RATED TECHNICAL CRITERIA - Written**

**Bids which meet all the mandatory technical criteria in each workstream(s) will be evaluated and scored as specified in the tables inserted below for their respective workstream(s).**

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive per respective workstream. Each point rated technical criterion must be addressed separately, for each workstream.

### **Instructions to Bidders for responding to point rated technical criteria:**

1. In addressing the point rated evaluation criteria, the Bidder must supplement the information supplied in response to the rated requirements with details outlining the depth and extent of the relevant experience, qualifications and specialized expertise of the proposed resource. All claims with regard to resource experience, qualifications or expertise must be substantiated through the provision of detailed project descriptions of how and where the claimed experience, qualifications or expertise were gained. Unsubstantiated claims of experience, qualifications or expertise will not be considered by the evaluation team during the point rated evaluation.

The Bidder must provide complete project details including but not limited to:

- Name & description of client organization;
- Name, phone and email address of client reference;
- Scope and objectives;
- Description of the roles and responsibilities of the Bidder or the Bidder's proposed resources in the project, process and or initiative; and
- Project start and end dates (month/year to month/year). In the case where the timelines of two or more projects overlap, the duration of time common to each project will not be counted more than once.

2. The Bidder's Score will be based on the evaluation scale provided below for the following categories and levels:

- RT1 – Management of Services
- RT2 – Achievement of Bidder on Projects
- RT3 – Achievement of Resources on Projects

For the purpose of the point rated technical criteria scale provided below, the experience of the Bidder's proposed resources will be considered.

The maximum number of pages, including text and graphics, to be submitted for responding to the parts RTC1, RTC2 and RTC3 of the Point Rated Technical Criteria – Written is ten (10) pages (including text and graphics).

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

- Proposed Resources Curriculum Vitae (CV)
- **Attachment 1 to Part 3**, Pricing Schedule
- Certifications and proof of education

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.

3. As applicable, the Bidder should indicate the location in the proposed resources' CVs of supporting information to substantiate relevant experience for each point rated evaluation criteria.
4. Each stream will be evaluated independently, as per below:

**For Workstream 1 - A passing mark of 70% or a minimum required score of 205 points out of 295** applies to the sum of the written technical proposal (Point Rated Technical Criteria – Written). Proposals for which evaluated scores fail to achieve this pass mark, as a minimum, will be deemed non-responsive.

**For Workstream 2 - A passing mark of 70% or a minimum required score of 135 points out 195** applies to the sum of the written technical proposal (Point Rated Technical Criteria – Written). Proposals for which evaluated scores fail to achieve this pass mark, as a minimum, will be deemed non-responsive.

**For Workstream 3 - A passing mark of 70% or a minimum required score of 135 points out 195** applies to the sum of the written technical proposal (Point Rated Technical Criteria – Written). Proposals for which evaluated scores fail to achieve this pass mark, as a minimum, will be deemed non-responsive.

**For Workstream 4 - A passing mark of 70% or a minimum required score of 140 points out 200** applies to the sum of the written technical proposal (Point Rated Technical Criteria – Written). Proposals for which evaluated scores fail to achieve this pass mark, as a minimum, will be deemed non-responsive.

**ATTACHMENT 2 TO PART 4  
TABLE 2  
POINT RATED TECHNICAL CRITERIA (RTC)**

#	DESCRIPTION	MAX SCORE	CONTRACTOR TO INSERT DATA	
			# POINTS FOR DEMONSTRATED EXPERIENCE	INSERT PAGE #
RTC1	<b>MANAGEMENT OF SERVICES</b>	50 Pts		
	<b><u>Applies to ALL four (4) workstreams:</u></b>  The Bidder should substantiate:  a) How it proposes to organize the PMSS Resources, and how the PMSS Resources will fit within: > The firm's (or joint venture's) existing organizational structure and internal governance ( <b>10 Points</b> ); and > The Project Resources identified in section PA 2 of <b>Annex A – Statement of Work (10 Points)</b> . b) How it proposes to effectively manage communication between the PMSS Resources and the members of the Project Team identified in section PA 2 of <b>Annex A – Statement of Work (10 Points)</b> . c) Its proposed methods for preventing financial disputes/claims against PWGSC ( <b>10 Points</b> ).			

	<p>d) Its proposed quality management processes that will be in place for this requirement (<b>10 Points</b>).</p> <p>Submissions will be scored in the following manner: Table 3, Generic Evaluation Table at the end of <b>Attachment 2 to Part 4</b> – Technical Criteria will be used to evaluate each of the criterion in Section RTC1.</p>			
<b>RTC2</b>	<p><b>ACHIEVEMENTS OF BIDDER ON PROJECTS</b></p> <p><b><u>Applies to ALL four (4) workstreams:</u></b></p> <p>The intent of Section RTC2 is to evaluate the Bidder's accomplishments, achievements, and experience in the project management, planning, and delivery of real property projects which must be of similar scope, complexity, and scale as the projects stated in <b>Annex A</b> Statement of Work. This will be evaluated using criterion RTC2.1 to RTC2.4 below.</p> <p>Bidders should substantiate the experience using the three (3) projects submitted as part of MT1. A combination of information from these three (3) projects can be used in response to the criterion below.</p>	<b>70 Pts</b>		
<b>RTC2.1</b>	<p>The Bidder should substantiate that one of the projects submitted as part of MT1 included project management services and had a contract value for project management services of \$5M or higher (<b>5 Points</b>).</p>			
<b>RTC2.2</b>	<p>One of the projects submitted by the Bidder as part of MT1 included project management services and had a contract value for project management services of \$20M or higher (<b>5 Points</b>).</p>			
<b>RTC2.3</b>	<p>One of the projects submitted by the Bidder as part of MT1 should also clearly substantiate their experience pertinent to:</p> <ul style="list-style-type: none"> <li>a) Bidder's experience to manage fit-up project(s) for office accommodation(s) over a continuous duration of two (2) years or longer (<b>5 Points</b>):</li> <li>b) Bidder's experience to manage project(s) related to the renovation or construction of a building in the public sector over a continuous duration of two (2) years or longer (<b>5 Points</b>).</li> <li>c) Bidder's experience over a continuous duration of two (2) years or longer within a Program of Work context with multiple contracts, with numerous inter-related projects underway at the same time, and at various stages of advancement (<b>5 Points</b>).</li> </ul>			

<p><b>RTC2.4</b></p>	<p>d) Bidder's experience in managing project(s) within demanding environments (e.g. high visibility, public setting, multiple stakeholders, time pressure, etc.) over a continuous duration of two (2) years or longer (<b>5 Points</b>).</p> <p>e) Bidder's experience in managing project(s) with multiple conflicting objectives (e.g. heritage conservation, security requirements, sustainability targets, etc.) over a continuous duration of two (2) years or longer (<b>5 Points</b>).</p> <p>f) Bidder's experience over a continuous duration of two (2) years or longer in managing project(s) in an occupied building, with construction occurring at the same time as the building was being used by tenants (<b>5 Points</b>).</p> <p>RTC2.1, RTC2.2 and RTC2.3 submissions will be scored in the following manner:</p> <ul style="list-style-type: none"> <li>➤ Substantiated relevant experience for two (2) years or more = 5 points</li> <li>➤ Substantiated relevant experience for less than two (2) years = 0 point</li> </ul> <p>Information to be supplied for each project submitted by the Bidder as part of MT1 should include, the following (<b>30 Points</b>):</p> <ul style="list-style-type: none"> <li>➤ Title of the project / program;</li> <li>➤ Name of the client;</li> <li>➤ Location;</li> <li>➤ Duration (start and completion dates – minimum two (2) years);</li> <li>➤ Scope summary (short description);</li> <li>➤ Final cost of the project;</li> <li>➤ Value of the Bidder's contract for real property project management services;</li> <li>➤ Role of the Bidder in the project;</li> <li>➤ Responsibilities of principals on the project; and</li> <li>➤ Client references – name, address, phone, and email of client contact at working level – references may be checked.</li> </ul> <p>Submissions will be scored in the following manner:</p> <ul style="list-style-type: none"> <li>➤ One (1) point per project will be awarded for each of the ten (10) items listed above that is clearly identified (i.e. one point per item per project, for a maximum of 30 points).</li> </ul>			
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<p><b>RTC3</b></p>	<p><b>ACHIEVEMENTS OF RESOURCES ON PROJECTS</b></p> <p>For each of the proposed Resources by the Bidder that meet the minimum points in the Flexible Grid located in <b>ATTACHMENT 1 TO PART 4</b>, TABLE 1, Flexible Grid – Resources, the Bidder should clearly substantiate experience that is pertinent to the following criteria, and that has been acquired over a duration of at least two (2) years within the past fifteen (15) years prior to the solicitation closing date.</p> <p>Submissions will be scored in the following manner: For each criterion listed under each of the Resource categories/levels identified in RTC3:</p> <ul style="list-style-type: none"> <li>➤ Substantiated relevant experience for two (2) years or more = 5 points</li> <li>➤ Substantiated relevant experience for less than two (2) years = 0 points</li> </ul>			
<p><b>RTC3.1</b></p>	<p><b>Applies to:</b> <b>WORKSTREAM 1</b> <b>REAL PROPERTY PROJECT MANAGEMENT SERVICES</b></p> <p><b>1. Portfolio Planner for Real Property – Senior</b></p> <ul style="list-style-type: none"> <li>a) Experience working as a “Portfolio Planner for Real Property” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</li> <li>b) Experience working as a “Portfolio Planner for Real Property” on projects valued over \$10M (<b>5 Points</b>).</li> <li>c) Experience working as a “Portfolio Planner for Real Property” on public sector projects (<b>5 Points</b>).</li> </ul> <p><b>2. Project Administrator for Real Property – Intermediate</b></p> <ul style="list-style-type: none"> <li>a) Experience working as a “Project Administrator for Real Property” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</li> <li>b) Experience working as a “Project Administrator for Real Property” on projects valued over \$5M (<b>5 Points</b>).</li> <li>c) Experience working as a “Project Administrator for Real Property” on public sector projects (<b>5 Points</b>).</li> </ul> <p><b>3. Project Leader for Real Property - Senior</b></p> <ul style="list-style-type: none"> <li>a) Experience working as a “Project Leader for Real Property” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</li> <li>b) Experience working as a “Project Leader” on projects valued over \$25M (<b>5 Points</b>).</li> <li>c) Experience working as a “Project Leader” on public sector projects (<b>5 Points</b>).</li> </ul>	<p><b>175 pts</b></p>		



	<p>d) Experience working as a “Project Leader” on fit-up projects valued over \$5M (<b>5 Points</b>).</p> <p><b>4. Project Leader/Executive for Real Property – Senior</b></p> <p>a) Experience working as a “Project Leader/Executive for Real Property” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Project Leader/Executive” on projects valued over \$50M (<b>5 Points</b>).</p> <p>c) Experience working as a “Project Leader/Executive” on public sector projects (<b>5 Points</b>).</p> <p>d) Experience working as a “Project Leader/Executive” on fit-up projects valued over \$10M (<b>5 Points</b>).</p> <p><b>5. Project Manager for Real Property – Senior</b></p> <p>a) Experience working as a “Project Manager” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Project Manager” on projects valued over \$20M (<b>5 Points</b>).</p> <p>c) Experience working as a “Project Manager” on public sector projects (<b>5 Points</b>).</p> <p>d) Experience working as a “Project Manager” on fit-up projects valued over \$5M (<b>5 Points</b>).</p> <p><b>6. Project Managers for Real Property – Intermediate</b></p> <p>a) Experience working as a “Project Manager” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Project Manager” on projects valued over \$10M (<b>5 Points</b>).</p> <p>c) Experience working as a “Project Manager” on public sector projects (<b>5 Points</b>).</p> <p>d) Experience working as a “Project Manager” on fit-up projects valued over \$2M (<b>5 Points</b>).</p> <p><b>7. Project Managers for Real Property – Junior</b></p> <p>a) Experience working as a “Project Manager” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Project Manager” on projects valued over \$5M (<b>5 Points</b>).</p> <p>c) Experience working as a “Project Manager” on public sector projects (<b>5 Points</b>).</p> <p>d) Experience working as a “Project Manager” on fit-up projects valued over \$1M (<b>5 Points</b>).</p> <p><b>8. Project Planner for Real Property – Senior</b></p> <p>a) Experience working as a “Project Planner for Real Property” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p>			
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RTC3.2	<p>b) Experience working as a “Project Planner for Real Property” on projects valued over \$10M (<b>5 Points</b>).</p> <p>c) Experience working as a “Project Planner for Real Property” on public sector projects (<b>5 Points</b>).</p> <p><b>9. Project Scheduler for Real Property – Senior</b></p> <p>a) Experience working as a “Project Scheduler for Real Property” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Project Scheduler for Real Property” on projects valued over \$5M (<b>5 Points</b>).</p> <p>c) Experience working as a “Project Scheduler for Real Property” on public sector projects (<b>5 Points</b>).</p> <p><b>10. Technical Writer for Real Property - Senior</b></p> <p>a) Experience working as a “Technical Writer” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Technical Writer” on projects valued over \$10M (<b>5 Points</b>).</p> <p>c) Experience working as a “Technical Writer” on public sector projects (<b>5 Points</b>).</p> <p><b>Applies to:</b> <b>WORKSTREAM 2</b> <b>PROJECT FINANCE AND PERFORMANCE MANAGEMENT</b></p> <p><b>11. Claims Analyst – Senior</b></p> <p>a) Experience working as a “Claims Analyst” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Claims Analyst” on projects valued over \$5M (<b>5 Points</b>).</p> <p>c) Experience working as a “Claims Analyst” on public sector projects (<b>5 Points</b>).</p> <p><b>12. Financial/Cost Specialist – Senior</b></p> <p>a) Experience working as a “Financial/Cost Specialist” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Financial/Cost Specialist” on projects valued over \$10M (<b>5 Points</b>).</p> <p>c) Experience working as a “Financial/Cost Specialist” on public sector projects (<b>5 Points</b>).</p> <p><b>13. Procurement Specialist - Senior</b></p> <p>a) Experience working as a “Procurement Specialist” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Procurement Specialist” on projects valued over \$10M (<b>5 Points</b>).</p>	75 Pts		
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RTC3.3	<p>c) Experience working as a “Procurement Specialist” on public sector projects (<b>5 Points</b>).</p> <p><b>14. Quality Assurance/Management Specialist – Senior</b></p> <p>a) Experience working as a “Quality Assurance/Management Specialist” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Quality Assurance/Management Specialist” on projects valued over \$10M (<b>5 Points</b>).</p> <p>c) Experience working as a “Quality Assurance/Management Specialist” on public sector projects (<b>5 Points</b>).</p> <p><b>15. Risk Management Specialist - Senior</b></p> <p>a) Experience working as a “Risk Management Specialist” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Risk Management Specialist” on projects valued over \$10M (<b>5 Points</b>).</p> <p>c) Experience working as a “Risk Management Specialist” on public sector projects (<b>5 Points</b>).</p> <p><b>Applies to:</b> <b>WORKSTREAM 3</b> <b>BUSINESS CONSULTING AND CHANGE MANAGEMENT</b></p> <p><b>16. Business Consultant – Senior</b></p> <p>a) Experience working as a “Business Consultant” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Business Consultant” on projects valued over \$10M (<b>5 Points</b>).</p> <p>c) Experience working as a “Business Consultant” on public sector projects (<b>5 Points</b>).</p> <p><b>17. Change Management Consultant – Senior</b></p> <p>a) Experience working as a “Change Management Consultant” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Change Management Consultant” on projects valued over \$5M (<b>5 Points</b>).</p> <p>c) Experience working as a “Change Management Consultant” on public sector projects (<b>5 Points</b>).</p> <p><b>18. Communications Consultant – Senior</b></p> <p>a) Experience working as a “Communications Consultant” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Communications Consultant” on projects valued over \$10M (<b>5 Points</b>).</p> <p>c) Experience working as a “Communications Consultant” on public sector projects (<b>5 Points</b>).</p>	75 Pts		
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RTC3.4	<p><b>19. Communications Consultant - Intermediate</b></p> <ul style="list-style-type: none"> <li>a) Experience working as a “Communications Consultant” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</li> <li>b) Experience working as a “Communications Consultant” on projects valued over \$5M (<b>5 Points</b>).</li> <li>c) Experience working as a “Communications Consultant” on public sector projects (<b>5 Points</b>).</li> </ul> <p><b>20. Organizational Development Consultant - Senior</b></p> <ul style="list-style-type: none"> <li>a) Experience working as an “Organizational Development Consultant” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</li> <li>b) Experience working as an “Organizational Development Consultant” on projects valued over \$10M (<b>5 Points</b>).</li> <li>c) Experience working as an “Organizational Development Consultant” on public sector projects (<b>5 Points</b>).</li> </ul> <p><b>Applies to:</b> <b>WORKSTREAM 4</b> <b>SPECIALIZED CONSULTING</b></p> <p><b>21. Professional Architectural/Engineering Consultant - Senior</b></p> <ul style="list-style-type: none"> <li>a) Experience working as a “Professional Architectural/Engineering Consultant” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</li> <li>b) Experience working as a “Professional Architectural/Engineering Consultant” on projects valued over \$20M (<b>5 Points</b>).</li> <li>c) Experience working as a “Professional Architectural/Engineering Consultant” on public sector projects (<b>5 Points</b>).</li> <li>d) Experience working as a “Professional Architectural/Engineering Consultant” on fit-up projects valued over \$5M (<b>5 Points</b>).</li> </ul> <p><b>22. Project Managers for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields – Senior</b></p> <ul style="list-style-type: none"> <li>a) Experience working as a “Project Manager with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</li> <li>b) Experience working as a “Project Manager with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields” on projects valued over \$20M (<b>5 Points</b>).</li> </ul>	80 Pts		
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	<p>c) Experience working as a “Project Manager with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields” on public sector projects (<b>5 Points</b>).</p> <p>d) Experience working as a “Project Manager with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields” on fit-up projects valued over \$5M (<b>5 Points</b>).</p> <p><b>23. Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields – Senior</b></p> <p>a) Experience working as a “Project Manager with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Project Manager with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields” on projects valued over \$20M (<b>5 Points</b>).</p> <p>c) Experience working as a “Project Manager with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields” on public sector projects (<b>5 Points</b>).</p> <p>d) Experience working as a “Project Manager with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields” on fit-up projects valued over \$5M (<b>5 Points</b>).</p> <p><b>24. Project Manager for Real Property with Technical Expertise in High-Level Security Requirements – Senior</b></p> <p>a) Experience working as a “Project Manager with Technical Expertise in High-Level Security Requirements” in real property projects of similar scope and complexity as the projects stated in <b>Annex A</b> Statement of Work (<b>5 Points</b>).</p> <p>b) Experience working as a “Project Manager with Technical Expertise in High-Level Security Requirements” on projects valued over \$20M (<b>5 Points</b>).</p> <p>c) Experience working as a “Project Manager with Technical Expertise in High-Level Security Requirements” on public sector projects (<b>5 Points</b>).</p> <p>d) Experience working as a “Project Manager with Technical Expertise in High-Level Security Requirements” on fit-up projects valued over \$5M (<b>5 Points</b>).</p>			
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Solicitation No. – N° de l'invitation  
EN439-211126  
Client Ref. No. – N° de réf. du client  
20211126

Amd. No. – N° de la modif.  
File No. – N° du dossier  
FK292.EN439-211126

Buyer ID – Id de l'acheteur  
FK292  
CCC No./N° CCC – FMS No./N° VME

## Point Rated Technical Criteria Evaluation Scales:

Applies to:

### WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES

Point Rated Technical Criteria and Scores	Required Minimum Number of Points	Maximum Number of Points
Technical Proposal – Written (RTW)	<b>205 Points</b>	<b>295 Points</b>
Bidder's Technical Proposal – Written (RTW)	Number of Points	Required Minimum Number of Points Met / Not Met
	<b>Points</b>	

Applies to:

### WORKSTREAM 2 - PROJECT FINANCE AND PERFORMANCE MANAGEMENT

Point Rated Technical Criteria and Scores	Required Minimum Number of Points	Maximum Number of Points
Technical Proposal – Written (RTW)	<b>135 Points</b>	<b>195 Points</b>
Bidder's Technical Proposal – Written (RTW)	Number of Points	Required Minimum Number of Points Met / Not Met
	<b>Points</b>	

Applies to:

### WORKSTREAM 3 - BUSINESS CONSULTING AND CHANGE MANAGEMENT

Point Rated Technical Criteria and Scores	Required Minimum Number of Points	Maximum Number of Points
Technical Proposal – Written (RTW)	<b>135 Points</b>	<b>195 Points</b>
Bidder's Technical Proposal – Written (RTW)	Number of Points	Required Minimum Number of Points Met / Not Met
	<b>Points</b>	

Applies to:

### WORKSTREAM 4 - SPECIALIZED CONSULTING

Point Rated Technical Criteria and Scores	Required Minimum Number of Points	Maximum Number of Points
Technical Proposal – Written (RTW)	<b>140 Points</b>	<b>200 Points</b>
Bidder's Technical Proposal – Written (RTW)	Number of Points	Required Minimum Number of Points Met / Not Met
	<b>Points</b>	

## GENERIC EVALUATION TABLE

PWGSC Evaluation Board members will use the generic evaluation table below to evaluate the strengths and weaknesses of the Bidder's response to evaluation criterion RTC1.

Scores will be distributed as follows:

- 0 – receives 0% of the weighting assigned to a criterion
- 2 – receives 20% of the weighting assigned to a criterion
- 4 – receives 40% of the weighting assigned to a criterion
- 6 – receives 60% of the weighting assigned to a criterion
- 8 – receives 80% of the weighting assigned to a criterion
- 10 – receives 100% of the weighting assigned to a criterion

ATTACHMENT 2 TO PART 4 TABLE 3 GENERIC EVALUATION TABLE					
Did not submit information which could be evaluated = 0 point					
	INADEQUATE	WEAK	ADEQUATE(6)	FULLY SATISFACTORY	STRONG
	2 points	4 points	6 points	8 points	10 points
<b>Understanding of Requirements</b>	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.
<b>Weaknesses</b>	Weaknesses cannot be corrected	Generally doubtful that weaknesses can be corrected	Weaknesses can be corrected	No significant weaknesses	No apparent weaknesses
<b>Qualifications and Experience</b>	Bidder does not possess qualifications and experience	Bidder lacks qualifications and experience	Bidder has an acceptable level of qualifications and experience	Bidder is qualified and experienced	Bidder is highly qualified and experienced
<b>Team Work</b>	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
<b>Relevant Sample Projects</b>	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
<b>Capability Performance</b>	Extremely poor, insufficient to meet performance requirements	Little capability to meet performance requirements	Acceptable capability, should ensure adequate results	Satisfactory capability, should ensure effective results	Superior capability, should ensure very effective results



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## ATTACHMENT 3 TO PART 4

**Applies to all four (4) workstreams:**

### **INDIGENOUS PARTICIPATION PLAN (IPP)**

To meet the Government of Canada's objectives of encouraging Indigenous socio-economic development through federally funded opportunities, Bidders are strongly encouraged to submit a draft Indigenous Participation Plan (IPP) as part of their RFP response.

Over the term of the contract, the IPP is intended to develop long-term capacity and sustainable and meaningful socio-economic benefits for Indigenous professionals and businesses in the fields of the Project Management Support Services as well as the various specialized professions covered under this project.

The IPP covers direct and non-direct benefits. For this RFP, direct benefits refer to Indigenous employment, including opportunities as the Contractor, one of its Sub-Contractors, or employees and/or personnel within the Bidders team members. Non-direct benefits refer to measures where there is a lack of Indigenous business capacity which can be developed by specialized training, internships and/or apprenticeships among others.

#### **Indigenous Business Capacity**

To identify Indigenous business capacity, for contracting or subcontracting purposes, you can review the list of Indigenous businesses registered in the Indigenous Business Directory (IBD). A link to the database has been provided below: [http://www.ic.gc.ca/eic/site/ccc\\_bt-rec\\_ec.nsf/eng/h\\_00011.html](http://www.ic.gc.ca/eic/site/ccc_bt-rec_ec.nsf/eng/h_00011.html)

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

- Canadian Council for Aboriginal Business [www.ccab.com](http://www.ccab.com)
- Ontario Ministry of Indigenous Affairs <https://www.ontario.ca/page/ministry-indigenous-affairs>

### **Indigenous Business definition**

For the purpose of this IPP, an Indigenous business can be:

- A band as defined by the Indian Act;
- A sole proprietorship;
- A limited company;
- A co-operative;
- A partnership;
- A not-for-profit organization in which Indigenous persons have at least 51 percent ownership and control;
- A joint venture consisting of two or more Indigenous businesses or an Indigenous business and a non-Indigenous business(es), provided that the Indigenous business(es) has at least 51 percent ownership and control of the joint venture. When an Indigenous business has six or more full-time employees at the date of submitting the bid, at least thirty-three percent of them must be Indigenous persons, and this ratio must be maintained throughout the duration of the contract. The bidder must certify in its submitted bid that it is an Indigenous business or a joint venture constituted as described above.

### **Indigenous Person definition**

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



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

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

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

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

### **Indigenous Participation Plan (IPP)**

#### **1- Human Resources Plan (1.25 Points)**

The IPP should include a Human Resource Plan that details how the Bidder intends to maximize the use of Indigenous employment within the fields of Project Management Support Services (refer to **Attachment 1 to part 4** Flexible Grid Resources and RS 1 - General Services **Annex A** for *Required Services (RS)*).

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

The Human Resource Plan should:

- 1- Identify the Indigenous team members currently within the Bidder Team/their qualifications/their position;
- 2- Provide the strategies to recruit and retain additional Indigenous persons.

#### **2- Business Plan (1.25 Points)**

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

The Business Plan should:

- 1- Identify the work intended to be carried out by Indigenous firms, as well as the dollar value of the work;
- 2- Detail how business with Indigenous firms will be managed; and
- 3- Detail on any development of new capabilities.

#### **3- Training and Skills Development Plan (1.25 Points)**

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

The Skills Development Plan should address the use of:

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

**4- Other Measures (1.25 Points)**

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

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

**Scoring:**

- Where the Bidder has provided information materially responding to each criteria listed above, the assigned score will be one point twenty-five (1.25) points for each criteria (accounting for a maximum of 5% of the overall Score).
- Where any criteria is missing or deemed materially unresponsive, the assigned score will be zero (0) for the corresponding criteria.

**IMPORTANT:**

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

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## PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

### 5.1 Certifications Required with the Bid

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

#### 5.1.1 Integrity Provisions - Declaration of Convicted Offences

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

### 5.2 Certifications Precedent to Contract Award and Additional Information

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

#### 5.2.1 Integrity Provisions – Required Documentation

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

Provide list of names below:

**INTEGRITY PROVISIONS - LIST OF NAMES  
INDIVIDUALS WHO ARE CURRENTLY DIRECTORS OF THE BIDDER:**

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**Procurement Business Number (PBN)** \_\_\_\_\_

### 5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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

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

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

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

## 5.3 Additional Certifications Precedent to Contract Award

### 5.3.1 Status and Availability of Resources

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

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

### 5.3.2 Education and Experience

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

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## ATTACHMENT 1 TO PART 5 FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY CERTIFICATION

### 1. Federal Contractors Program For Employment Equity - Certification

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

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

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

Instructions to the Bidder: Complete both A and B.

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

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

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

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

## PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS

### 6.1 Security Requirement

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

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

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

6.1.3 For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

### 6.2 Resources Information for Security

To provide services against any resulting contract, the Bidder **must** specify the following information regarding the proposed resources in **Attachment 1 to Part 4** Flexible Resource Grid and **Attachment 2 to Part 4** - All Tables:

For each of the Bidder's selected workstream:

Please attach a list to this document, with the requested information needed (see below) for each of the proposed resources.

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Client Ref. No. – N° de réf. du client  
20211126

Amd. No. – N° de la modif.  
File No. – N° du dossier  
FK292.EN439-211126

Buyer ID – Id de l'acheteur  
FK292  
CCC No./N° CCC – FMS No./N° VME

## RESOURCES INFORMATION FOR SECURITY

### Workstream 1 - Real Property Project Management Services

#	RESOURCE CATEGORY	LEVEL OF EXPERTISE	LEGAL NAME (FIRST AND LAST)	DATE OF BIRTH (YYYY-MM-DD)	HIGHEST CURRENT SECURITY LEVEL CLEARANCE HELD	SECURITY ID NUMBER
1	Portfolio Planner for Real Property	Senior				
2	Project Administrator for Real Property	Intermediate				
3	Project Leader for Real Property	Senior				
4	Project Leader / Executive for Real Property	Senior				
5	Project Manager for Real Property	Senior				
6	Project Manager for Real Property	Intermediate				
7	Project Manager for Real Property	Junior				
8	Project Planner for Real Property	Senior				
9	Project Scheduler for Real Property	Senior				
10	Technical Writer for Real Property	Senior				

### Workstream 2 - Project Finance and Performance Management

#	RESOURCE CATEGORY	LEVEL OF EXPERTISE	LEGAL NAME (FIRST AND LAST)	DATE OF BIRTH (YYYY-MM-DD)	HIGHEST CURRENT SECURITY LEVEL CLEARANCE HELD	SECURITY ID NUMBER
11	Claims Analyst	Senior				
12	Financial/Cost Specialist	Senior				
13	Procurement Specialist	Senior				
14	Quality Assurance/Management Specialist	Senior				
15	Risk Management Specialist	Senior				

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### Workstream 3 - Business Consulting and Change Management

#	RESOURCE CATEGORY	LEVEL OF EXPERTISE	LEGAL NAME (FIRST AND LAST)	DATE OF BIRTH (YYYY-MM-DD)	HIGHEST CURRENT SECURITY LEVEL CLEARANCE HELD	SECURITY ID NUMBER
16	Business Consultant	Senior				
17	Change Management Consultant	Senior				
18	Communications Consultant	Senior				
19	Communications Consultant	Intermediate				
20	Organizational Development Consultant	Senior				

### Workstream 4 - Specialized Consulting

#	RESOURCE CATEGORY	LEVEL OF EXPERTISE	LEGAL NAME (FIRST AND LAST)	DATE OF BIRTH (YYYY-MM-DD)	HIGHEST CURRENT SECURITY LEVEL CLEARANCE HELD	SECURITY ID NUMBER
21	Professional Architectural/Engineering Consultant	Senior				
22	Project Manager for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields	Senior				
23	Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields	Senior				
24	Project Manager for Real Property with Technical Expertise in High-Level Security Requirements	Senior				



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### **6.3 Financial Capability**

[SACC Manual clause A9033T \(2012-07-16\), Financial Capability](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/5/A/A9033T/8) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/5/A/A9033T/8>).

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## PART 7 – RESULTING CONTRACT CLAUSES

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

**Note to Bidders: The resulting contracts will only include the applicable workstreams above which are to be awarded to the successful bidders in accordance with the evaluation methodology set out in this bid solicitation. If a bidder is selected for award of more than one workstream, Canada reserves itself the right to award one contract per workstream.**

### 1. Statement of Work

Public Works and Government Services Canada (PWGSC) requires real property project management support services to be provided by a highly experienced service provider in the field of real property project management. The services will be to assist PWGSC with a full range of day-to-day real property project management duties in support of the Government of Canada Real Property Projects in the National Capital Area. The services must be provided in accordance with Statement of Work attached at **Annex A**.

The level of effort for service requirements may vary in accordance with the PWGSC projects and will be on an 'as and when' required basis.

The services include 24 resource categories/levels which are divided into the following four (4) workstreams:

Workstream 1: Real Property Project Management Services (10 resource categories/levels)  
Workstream 2: Project Finance and Performance Management (5 resource categories/levels)  
Workstream 3: Business Consulting/Change Management (5 resource categories/levels)  
Workstream 4: Specialized Consulting (4 resource categories/levels)

PWGSC intends to issue one (1) Contract per each workstream for the required services to be provided as a result of this solicitation. However, Bidders may submit a bid for one or more of the workstreams, as identified within the Request for Proposal (RFP).

#### 1.1 Task Authorization

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

##### 1.1.2 Task Authorization Process

1. The Project Authority will provide the Contractor with a description of the task using the "Task Authorization" form specified in **Annex E**.
2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis (bases) and methods of payment as specified in the Contract.
3. The Contractor must provide the Project Authority, within 7 calendar days of its receipt, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.

- 
4. The Contractor must not commence work until a TA authorized by the Project Authority has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.

#### 1.1.3 Task Authorization Limit

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

#### 1.1.4 Minimum Work Guarantee - All the Work - Authorized TAs

- 1.1.4.1 "Maximum Contract Value" means the sum specified in Contract clause 6.2.1 (Canada's Total Liability, Cumulative Total of all authorized TAs); and "Minimum Contract Value" means a fixed amount of \$200,000.00.

- 1.1.4.2 Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 1.1.4.3 of this clause. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work. Canada's maximum liability for Work requested in authorized TAs, performed by the Contractor and accepted by Canada must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.

- 1.1.4.3 In the event that Canada does not request Work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the cost of the Work requested in authorized TAs, performed by the Contractor and accepted by Canada.

- 1.1.4.4 Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

#### 1.1.5 Periodic Usage Reports - Contracts with TAs

- 1.1.5.1 The Contractor must compile and maintain records on its provision of services to the federal government under authorized Task Authorizations issued under the Contract.

- 1.1.5.2 The Contractor must provide this data in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "nil" report.

- 1.1.5.3 The data must be submitted on a quarterly basis to the Contracting Authority.

The quarterly periods are defined as follows:

1st quarter: April 1 to June 30;  
2nd quarter: July 1 to September 30;  
3rd quarter: October 1 to December 31; and  
4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than 15 calendar days after the end of the reporting period.

#### 1.1.5.4 Reporting Requirement - Details

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

For each authorized task:

- i. The authorized task number or task revision number(s);
- ii. A title or a brief description of each authorized task;
- iii. The total estimated cost specified in the authorized Task Authorization (TA) of each task, exclusive of Applicable Taxes;
- iv. The total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
- v. The start and completion date for each authorized task; and
- vi. The active status of each authorized task, as applicable.

For all authorized tasks:

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

## 2 Standard Clauses and Conditions

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

### 2.1 General Conditions

2035 (2020-05-28), [General Conditions - Higher Complexity - Services](#), apply to and form part of the Contract.

[Section 08 – Replacement of Specific Individuals, of 2035 \(2008-05-12\)](#) General Conditions – Higher Complexity – Services - is deleted and replaced with the following:

1. If the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:
  - a) The name, qualifications and experience of a proposed replacement immediately available for Work; and
  - b) Security information on the proposed replacement as specified by Canada, if applicable. Any assessment of the information provided will occur as per 2 (b) below.
2. Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:

- 
- a) Exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract for default under Article titled "Default of the Contractor"; or
  - b) Assess the information provided under 1 (a) and (b) above or, if it has not yet been provided, require the Contractor propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that meet or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement, Canada may accept the replacement, exercise the rights in 2 (a) above, or require the Contractor to propose another replacement within five working days' notice.
3. Where an Excusable Delay applies, Canada may require 2 (b) above instead of terminating under the "Excusable Delay" Article. An Excusable Delay does not include resource unavailability due to allocation of the resource to another Contract or project (including those for the Crown) being performed by the Contractor or any of its affiliates.
  4. The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that a resource stop performing the Work. In such a case, the Contractor must immediately comply with the order. The fact that the Contracting Authority does not order that a resource stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.
  5. The obligations in this article apply despite any changes that Canada may have made to the Client's operating environment.

[Section 17 - Interest on Overdue Accounts, of 2035 \(2008-12-12\)](#) General Conditions - Higher Complexity - Services - will not apply to payments made by credit cards.

With respect to [Section 30 - Termination for Convenience, of 2035 \(2008-12-12\)](#) –General Conditions - Higher Complexity - Services, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

- 04) The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.
- 05) Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of:
  - (a) The total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Revenue Guarantee, or due to the Contractor as of the date of termination; or
  - (b) The amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.
- 06) The Contractor will have no claim for damages, compensation, loss of profit, interest, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

## **2.2 Specific Persons**

The Contractor must provide the services of the specific persons authorized by the contracting authority to perform the work as stated in the Contract.

## **2.3 Professional Services**

The Contractor must provide professional services on request as specified in this Contract. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, language proficiency and security clearance) and must be competent to provide the required services by any delivery dates described in the Contract.

If the Contractor fails to deliver any deliverable or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Technical Authority within ten (10) working days detailing the actions that the Contractor will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.

## **2.4 Reorganization of Client**

The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Technical Authority, as required to reflect the new roles and responsibilities associated with the reorganization.

## **3 Security Requirement**

### **3.1** The following security requirement (SRCL and related clauses provided by the [Contract Security Program](https://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) (<https://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) apply and form part of the Contract:

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Facility Security Clearance at the level of SECRET, issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to CLASSIFIED information, assets or sensitive site(s) must EACH hold a valid personnel security screening at the level of SECRET, or RELIABILITY STATUS, as required, granted or approved by the CSP, PWGSC.
3. The Contractor/Offeror MUST NOT remove any CLASSIFIED 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 attached at **Annex C**;
- b) *Industrial Security Manual* (Latest Edition).

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

#### **4 Term of Contract**

##### **4.1 Period of the Contract**

The period of the Contract is from the date of Contract to \_\_\_\_\_, inclusive (initial period is 3 year period).

##### **4.1.1 Option to Extend the Contract**

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to one (1) additional one (1) year period under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

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

#### **5 Authorities**

##### **5.1 Contracting Authority**

The Contracting Authority for the Contract is:  
Bushra Mirza  
Supply Specialist  
Public Works and Government Services Canada  
Real Property Contracting Directorate

Telephone: 613-296-8782  
E-mail address: [Bushra.Mirza@pwgsc-tpsgc.gc.ca](mailto:Bushra.Mirza@pwgsc-tpsgc.gc.ca)

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

##### **5.2 Project Authority**

The Project Authority (1) for the Contract is:  
Will be filled in at time of contract award.

In his/her absence, the Project Authority (2) is:  
Will be filled in at time of contract award.

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

### **5.3 Contractor's Representative**

The Contractor's Representative (1) for the Contract is:  
Will be filled in at time of contract award.

In his/her absence, the Contractor's Representative (2) is:  
Will be filled in at time of contract award.

### **5.4 Joint Venture Contractor (If Applicable)**

The Contractor confirms that the name of the joint venture is \_\_\_\_\_ and that it is comprised of the following members: (list all the joint venture members named in the Contractor's bid). With respect to the relationship among the members of the joint venture Contractor, each member agree, represents and warrants (as applicable) that:

- a) \_\_\_\_\_ has been appointed as the "representative member" of the joint venture Contractor and has full authority to act as agent for each member regarding all matters relating to the contract;
- b) By giving notice to the representative member, Canada will be considered to have given notice to all the members of the joint venture Contractor; and
- c) All payments made by Canada to the representative member will act as a release by all the members. All the members agree that Canada may terminate the contract at its discretion if there is a dispute among the members that, in Canada's opinion, affects the performance of the work in any way. All the members are jointly and severally liable for the performance of the entire contract.

The Contractor acknowledges that any change in the membership of the joint venture (i.e. a change in the number of members or the substitution of another legal entity for an existing member) constitutes an assignment and is subject to the assignment provisions of the General Conditions.

Note to the Contractor: this article will be deleted if the Contractor awarded the contract is not a joint venture. If the Contractor is a joint venture this clause will be completed with the data provided in its bid.

## **6 Payment**

### **6.1 Basis of Payment**

#### **Firm Lot Price TA**

When the applicable basis of payment specified in a TA authorized and issued under the Contract is firm lot price, in consideration of the Contractor satisfactorily completing all of its obligations



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under the authorized TA, the Contractor will be paid the firm lot price stipulated in the authorized TA, as determined in accordance with the Basis of Payment cost elements in **Annex B**. Customs duties are included and Applicable Taxes are extra.

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

or

#### **Ceiling Price TA**

For the Work described in the Statement of Work in **Annex A** and specified in the authorized TA:

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

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

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

or

#### **TA subject to a Limitation of Expenditure**

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

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

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

- a) When it is seventy-five percent (75%) committed;
- b) Four (4) months before the final delivery date specified in the authorized TA; or

- c) As soon as the Contractor considers that the authorized TA funds are inadequate for the completion of the Work specified in the authorized TA;

whichever comes first.

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

## **6.2 Limitation of Expenditure - Cumulative Total of all Authorized TAs**

- 6.2.1 Canada's total liability to the Contractor under the Contract for all authorized TAs, inclusive of any revisions, must not exceed the sum of \$ \_\_\_\_\_ (will be filled in at time of contract award). Customs duties are included and the Applicable Taxes are extra.

- 6.2.2 No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.

- 6.2.3 The Contractor must notify the Contracting Authority, in writing, as to the adequacy of this sum:

- a) When it is seventy five percent (75%) committed;
- b) Four (4) months before the Contract expiry date; or
- c) As soon as the Contractor considers that the sum is inadequate for the completion of the Work required and requested in all authorized TAs, inclusive of any revisions,

whichever comes first.

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

## **7 Methods of Payment – Authorized Task Authorization (TA)**

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

Single Payment  
(SACC Manual clause H1000C)

**or**

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

**or**

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

**or**

Monthly Payments  
(SACC Manual clause H1008C)

## 7.1 SACC Manual Clauses

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

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

## 7.2 Electronic Payment of Invoices – Contract

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

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

## 7.3 Invoicing Instructions

By submitting an invoice, the Contractor certifies that the invoice is consistent with the Work delivered and is in accordance with the Contract.

### 1. Invoices must show:

- a) Company name and address;
- b) Contract Number;
- c) Description of the Work;
- d) Applicable tax as a separate line item;
- e) Procurement Business Number (PBN), and
- f) Client Reference Number (CRN);

### 2. Each invoice must be supported by:

- a) **A copy of time sheets to support the time claimed;**
- b. A copy of the release document and any other documents as specified in the Contract;
- c. A copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
- d. A copy of the monthly progress report.

### 3. Invoices must be distributed as follows:

- a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

OR

- b. The original and one (1) copy must be forwarded to the following address for certification and payment:

**Public Works and Government Services Canada  
Les Terrasses de la Chaudière (LTDLC)  
25 Eddy Street, Suite 226  
Gatineau, Quebec, J8X 4B5**

Or by email as a PDF to:

[TPSGC.SITraitementDeAT-RPSTAProcessing.PWGSC@tpsgc-pwgsc.gc.ca](mailto:TPSGC.SITraitementDeAT-RPSTAProcessing.PWGSC@tpsgc-pwgsc.gc.ca)  
[TPSGC.SIRPSCNFIGestion-NCAPDFIManagement.PWGSC@tpsgc-pwgsc.gc.ca](mailto:TPSGC.SIRPSCNFIGestion-NCAPDFIManagement.PWGSC@tpsgc-pwgsc.gc.ca)

AND

- c. One (1) copy to the Contracting Authority by email as a PDF to:

[Bushra.Mirza@pwgsc-tpsgc.gc.ca](mailto:Bushra.Mirza@pwgsc-tpsgc.gc.ca)

4. Payment will only be made on receipt of satisfactory invoices duly supported by any specified documents called for under this contract. Failure to submit the correct information may result in the rejection of the invoice for processing.

#### **7.4 No Responsibility to Pay for Work not performed due to Closure of Government Offices**

- a) Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
- b) If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises.

### **8 Certifications**

#### **8.1 Compliance**

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

#### **8.2 Federal Contractors Program for Employment Equity - Default by the Contractor**

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "FCP Limited Eligibility to Bid" list.

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The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

## 9 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of \_\_\_\_\_.

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

## 10 Priority of Documents

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

- a. The Articles of Agreement;
- b. The general conditions **2035 (2020-05-28)**, General Conditions - Higher Complexity – Services;
- c. **Annex A**, Statement of Work;
- d. **Annex B**, Basis of Payment;
- e. **Annex C**, Security Requirements Check List (SRCL);
- f. **Annex D**, Insurance Requirements;
- g. **Annex E** – Task Authorization Form and the signed Task Authorizations (including all of their annexes, if any); and
- h. **Annex F** – Template for Reporting on the Results of the Indigenous Participation Plan (IPP)
- i. The Contractor's bid dated \_\_\_\_\_ (YYYY-MM-DD), as clarified on \_\_\_\_\_ (YYYY-MM-DD) and, as amended on \_\_\_\_\_ (YYYY-MM-DD) (insert date).

## 11 Insurance – Specific Requirements

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

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

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force.

For Canadian-based Contractors, coverage must be placed with an Insurer licensed to carry out business in Canada, however, for Foreign-based Contractors, coverage must be placed with an Insurer with an A.M. Best Rating no less than "A-".

The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

## **12 Proactive Disclosure of Contracts with Former Public Servants, if applicable**

By providing information on its status, with respect to being a former public servant in receipt of a [Public Service Superannuation Act](#) (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with [Contracting Policy Notice: 2019-01](#) of the Treasury Board Secretariat of Canada.

## **13 Government Site Regulations**

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

## **14 Indigenous Participation Plan**

Within 60 days after Contract Award, the Contractor must submit to the Crown for approval a finalized Indigenous Participation Plan (IPP) to include, at a minimum, the draft Plan submitted with the bid proposal. Each year, one month after the anniversary date of the contract, the Contractor must submit an annual report (**Annex F**) detailing the IPP accomplishments in the preceding year. Based on the finalized IPP, Canada may negotiate an Incentive program, the type/value will be solely at the Crown's discretion and negotiated post Contract Award.

## **15 Dispute Resolution**

- a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "[Dispute Resolution](#)".

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## **ANNEX A – STATEMENT OF WORK**

**TITLE: PSPC's NATIONAL CAPITAL AREA PROJECT DELIVERY (NCAPD) REAL PROPERTY PROJECT MANAGEMENT SUPPORT SERVICES (PMSS)**

### **TERMINOLOGY**

#### **PROGRAM REQUIREMENTS (PR)**

- PR 1 OBJECTIVE**
- PR 2 BACKGROUND**
- PR 3 SCOPE OF WORK**
- PR 4 PROJECT RESOURCES**
- PR 5 TASKS**
- PR 6 DELIVERABLES**
- PR 7 CLIENT SUPPORT**
- PR 8 OFFICIAL LANGUAGES**
- PR 9 WORK LOCATION**
- PR 10 TRAVEL**
- PR 11 NO RESPONSIBILITY TO PAY FOR WORK NOT PERFORMED DUE TO CLOSURE OF GOVERNMENT OFFICES**
- PR 12 HERITAGE CHARACTER**
- PR 13 APPLICABLE DOCUMENTATION**
- PR 14 PROJECT MANAGEMENT SUPPORT SERVICES (PMSS)**

#### **PROJECT ADMINISTRATION (PA)**

##### **PA 1 General Requirements**

- 1.1 PSPC Project Directors (PD) and PSPC Project Managers (PM)
- 1.2 Correspondence Protocol
- 1.3 Media
- 1.4 Security Related to Program and Project Information
- 1.5 Anticipated Level of Effort
- 1.6 Scheduling Work
- 1.7 Official Languages
- 1.8 Project Deliverables
  - PMSS Monthly Reports
  - Schedule Monthly Report
- 1.9 Acceptance of PMSS Deliverables
- 1.10 Response Time
- 1.11 Program and Project Meetings
- 1.12 Risk Management Sessions
- 1.13 Work Location
- 1.14 Construction Activity and Review
- 1.15 Change Management

##### **PA 2 Project Teams**

- 2.1 Project Team Organization
- 2.2 Roles and Responsibilities of the Project Team

**PA 3 Submissions, Reviews and Approval Process**

- 3.1 Authorities Having Jurisdiction
- 3.2 Health and Life Safety

**PA 4 PSPC National Project Management System (NPMS) Model**

**REQUIRED SERVICES (RS)**

**RS 1 General Services**

- 1.1 Scope and Activities
- 1.2 Typical Required Services (RS) Support Activities

**RS 2 Project Planning Phase**

- 2.1 Scope and Activities
- 2.2 Monthly Deliverables

**RS 3 Project Design Phase**

- 3.1 Scope and Activities
- 3.2 Monthly Deliverables

**RS 4 Project Implementation Phase**

- 4.1 Scope and Activities
- 4.2 Monthly Deliverables

**RS 5 Project Delivery Close-Out Phase**

- 5.1 Scope and Activities
- 5.2 Monthly Deliverables

**ATTACHMENT 1 TO ANNEX A – EVALUATION REPORT PER RESOURCE**



## TERMINOLOGY

The following terms are used in this document:

<i>A&amp;E Resource / A&amp;E Team</i>	The architectural, interior design and engineering teams including specialist resources in contract with PSPC for A&E services for the various program projects.
<i>Client / Users</i>	Various federal departments and agencies and primary facility occupants.
<i>NCAPD</i>	National Capital Area Project Delivery
<i>NPMS</i>	National Project Management System that is the project management system and set of processes used by PSPC and also mandated by Treasury Board.
<i>PMSS Resources</i>	The Contractor's resources who are providing the project management support services.
<i>Project Authority</i>	The PSPC representative responsible for the management of the Contract for services obtained from the PMSS Resources, and responsible for all matters concerning the technical content of the Work under the Contract. The Project Authority will assign members of his/her project management staff to administer the various projects under the program of work.
<i>Project Teams</i>	The PSPC Project Teams responsible for delivering projects in partnership with other government organizations.
<i>PSPC</i>	Public Services and Procurement Canada
<i>PSPC's Departmental Representative</i>	The PSPC representative responsible for the management of the Contract for PMSS services. The Departmental Representative will assign Project Managers (PM) to administer the various projects.
<i>RPS</i>	Real Property Services (Branch) of Public Services and Procurement Canada

## PROGRAM REQUIREMENTS (PR)

### PR 1 OBJECTIVE

Public Services and Procurement Canada (PSPC) requires a variety of expertise in Project Management Support Services with knowledge and experience in supporting and managing Government of Canada Real Property Projects in the NCA. As outlined in the Federal Real Property and Federal Immovables Act (link: "<http://laws-lois.justice.gc.ca/eng/acts/F-8.4/index.html>") PSPC, through its Real Property Services (RPS), manages one of the largest and most diverse real estate portfolios in the country. RPS provides federal departments and organizations with affordable, productive work environments, a full range of Real Property services including strategic and expert advice that supports the Government of Canada in the delivery of programs to Canadians.

The RPS National Capital Area Project Delivery (NCAPD) directorate requires a variety of expertise in the support of planning and delivery of its wide range of Programs of Work on an "as and when required basis". This will include, but will not be limited to, Business Consultant, Change Management Consultant, Claims Analyst, Communications Consultant, Organizational Development Consultant, Professional Architectural/Engineering Consultant, Procurement Specialist, Quality Assurance/Management Specialist, Risk Management Specialist, Technical Writer, Financial/Cost Specialist, Portfolio Planner, Project Administrator, Project Leader/Executive, Project Leader, Project Planner, Project Scheduler, Project Manager, Project Manager with scientific expertise in environmental, chemical, biological requirements, and other scientific fields, Project Manager with technical expertise in geotechnical, structural, electrical, seismic requirements, and other recognized engineering fields, and Project Manager with technical expertise in high level security requirements.

The resources will require expertise related to supporting the planning and delivery of real property programs. Levels of service will include *Junior*, *Intermediate* and *Senior* levels and specialists with various areas of expertise.

The following objectives must be met throughout the duration of the Contract:

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

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

- Professional conduct in all phases of the project, employing best practices for cost, schedule, quality, scope management and control;
- Rigorous scheduling, planning, and control at all phases of each project and the overall program with specific intent to mitigate claims;
- Strong and disciplined change control system;
- An accelerated delivery of services to meet the scheduling constraints and a commitment by the A&E Team to develop an integrated design solution compatible with the heritage character of the building;

- Quality assurance reviews during the design and construction phases and commissioning of facilities;
- Projects will be subject to Value Engineering as early as during the concept stage;
- Continuous risk identification and management program employing effective methodologies and responses to ensure effective project and program delivery; and
- Continuous and comprehensive documentation of each project at all stages.

## PR 2 BACKGROUND

PSPC provides departments and agencies with office and common use accommodation and acts as stewards for various public works such as buildings, bridges and dams, and national treasures such as the Parliamentary Precinct and other heritage assets across Canada. PSPC Real Property Services also provides other federal departments and agencies with expert professional and technical Real Property services.

RPS manages one of the largest and most diverse portfolios of real estate in Canada, and provides federal departments and organizations with affordable, productive work environments and a full range of Real Property services. RPS responsibilities include asset acquisitions, disposals and improvements, fit-up of accommodation space, new construction, renovation and remediation of built-works including buildings, bridges, dams and roads.

The key to successful project implementation is adherence to effective project delivery principles and active communication. PSPC project delivery practices through its National Project Management System (NPMS) conform to Treasury Board policies and generally align with the principles of the Project Management Institute Project Management Body of Knowledge Guide (PMBOK).

RPS NCAPD manages Real Property projects in the NCA using NPMS. The NPMS model is a key component of the PSPC project management methodology which provides distinct control points that are linked with the PSPC project approval process and identifies deliverables at each phase, activity and task. Required services are described using the NPMS Project Stages (Link: <http://www.tpsgc-pwgsc.gc.ca/biens-property/sngp-npms/index-eng.html>)

## PR 3 SCOPE OF WORK

The Contractor must provide required Real Property Project Management Resources on an “as and when required basis” to support PSPC in the delivery of Real Property projects in the NCA (as outlined in the Task Authorization sent for the Work) and in accordance with the best practices of the Project Management Institute and the NPMS. Projects may be in any of the following stages: Inception, Identification or Delivery. Required support to PSPC will include, but will not be limited to, *Junior*, *Intermediate* and *Senior* levels, in the various Real Property Project Management Stream with Government of Canada Real Property Project Management experience.

## PR 4 PROJECT RESOURCES

### WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES

1	Portfolio Planner for Real Property	<i>Senior</i>
2	Project Administrator for Real Property	<i>Intermediate</i>
3	Project Leader for Real Property	<i>Senior</i>
4	Project Leader / Executive for Real Property	<i>Senior</i>
5	Project Manager for Real Property	<i>Senior</i>
6	Project Manager for Real Property	<i>Intermediate</i>

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7	Project Manager for Real Property	<i>Junior</i>
8	Project Planner for Real Property	<i>Senior</i>
9	Project Scheduler for Real Property	<i>Senior</i>
10	Technical Writer for Real Property	<i>Senior</i>

#### **WORKSTREAM 2 - PROJECT FINANCE AND PERFORMANCE MANAGEMENT**

11	Claims Analyst	<i>Senior</i>
12	Financial/Cost Specialist	<i>Senior</i>
13	Procurement Specialist	<i>Senior</i>
14	Quality Assurance/Management Specialist	<i>Senior</i>
15	Risk Management Specialist	<i>Senior</i>

#### **WORKSTREAM 3 - BUSINESS CONSULTING AND CHANGE MANAGEMENT**

16	Business Consultant	<i>Senior</i>
17	Change Management Consultant	<i>Senior</i>
18	Communications Consultant	<i>Senior</i>
19	Communications Consultant	<i>Intermediate</i>
20	Organizational Development Consultant	<i>Senior</i>

#### **WORKSTREAM 4 - SPECIALIZED CONSULTING**

21	Professional Architectural/Engineering Consultant	<i>Senior</i>
22	Project Manager for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields	<i>Senior</i>
23	Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields	<i>Senior</i>
24	Project Manager for Real Property with Technical Expertise in High-Level Security Requirements	<i>Senior</i>

#### **PR 5 TASKS**

The Contractor must provide support to the Project Management Team for RPS projects. Each Task Authorization issued by the Project Authority will outline the specific level of each resource, the type of resource required, the Work required and location of the Work.

Tasks will include, but will not be limited to, the following:

- Planning and coordinating project management activities including financial, planning and contracting aspects;
- Working with a variety of project management tools such as Microsoft Project, MSWord, MS Excel, MS Power Point etc.;
- Preparing project documentation including Statements of Requirements (SOR), Preliminary Project Plans (PPP), Feasibility Reports (FR), Investment Analysis Reports (IAR), Project Schedules, Project Costing Analyses, Project Management Plans (PMP), Risk Management

- 
- Plans (RMP), Request for Qualifications (RFQ), Request for Proposals (RFP), and Closeout documentation including Lessons Learned and Best Practises;
- Formulating and managing project plans by defining deliverables, identifying and procuring necessary resources, identifying key milestones, reviewing project progress, and engaging in ongoing risk management;
  - Developing and maintaining various systems for the management and control of the project in a manner compatible with client standards and guidelines. This includes financial, approval tracking, change management, communications, and security protocol for project staff and records management system;
  - Preparing Request for Proposals (RFP) for Consulting and Construction services for planning, design and construction;
  - Supporting the PSPC Project Authority to oversee the Design consultant contracts through the Project Delivery stage;
  - Supporting the PSPC Project Authority in the administration of contracts for architectural and engineering services, construction, and commissioning;
  - Supporting the PSPC Project Authority to oversee the Change Management Process including Requests for Information (RFI), Contemplated Change Notices (CCN) and Change Orders (CO);
  - Supporting the PSPC Project Authority in the resolution of issues;
  - Providing monthly progress reports with project cash flow projections, overall budgeting information, and project schedule updates;
  - At substantial completion, participating in inspections or acceptance Boards: inspecting the work, evaluating amounts withheld due to deficiencies, accepting the work on behalf of client, recommending issuance of the Interim Certificate and payment to the Contractor;
  - Ensuring that deficiencies and incomplete work are identified, managed, corrected and accepted as complete promptly;
  - Recommending issuance of Final Completion Certificate;
  - Conducting post project reviews, warranty inspections and preparing lessons learned;
  - Working with project teams and other stakeholders, managing real property projects and contract management issues;
  - Supporting the PSPC Project Authority in the compilation of project data and the preparation and production of reports; and
  - Supporting the PSPC Project Authority with independent reviews of project costing and analyses.

## **PR 6 DELIVERABLES**

The Contractor must be able to provide the following Deliverables based on the Task Authorization issued, which can include, but is not limited to:

- a) Written and verbal advice;
- b) Issue papers / Briefing Notes;
- c) Presentation decks and materials;
- d) Meeting facilitation and reports (e.g. Monthly Progress Reports);
- e) Management Action Plans;
- f) Work Plans for specific initiatives;
- g) Business Cases;
- h) Business Planning, including Risk Planning and Risk Analysis, Risk Management Plans, Investment Analysis Reports, and Statements of Requirements;

- 
- i) Tracking against plans – including level of effort and resource estimation as part of business planning;
  - j) Trend Analyses;
  - k) Fit/Gap Analyses;
  - l) Guides, manuals, reports to be disseminated to various stakeholders as required;
  - m) Meeting agendas, scheduling, and minutes;
  - n) Meeting materials (e.g. reference materials, etc.);
  - o) Synthesis report of facilitated meetings;
  - p) Project activity reports, project performance reports, Project data analytics and reports;
  - q) Project Management Plans and Project Documentation such as Project Schedules, Lessons Learned, Contemplated Change Notices (CCN), Change Orders (CO), Requests for Information (RFI), Product Turn-Over (PTO), Project Management Plan (PMP), Statements of Work (SOW), Interim Certificate of Completion, Final Certificate of Completion, Progress Reports, Deficiencies Reports, Post Project Review Reports, and Project Forecasts; and
  - r) Conversation notes, design documentation, site inspection documentation and any other Work requested on the issued Task Authorization.

The level of support versus management services provided by the Contractor's resources for items listed above may vary depending upon the needs of the project.

Deliverables are to be submitted in hard and soft copies in appropriate project management software formats, e.g. MS Project and MS Office Suite applications as identified by the Project Authority. All electronic deliverables must comply with the departmental software standards, currently Microsoft Office Suite 2007 or the latest version of MS Office. All applicable standards to carry out the Work must be in accordance with the NPMS and other PSPC standards. Where required, PSPC will provide the Contractor with the required forms and templates to meet these standards.

There may be a requirement for the Contractor's resource to access information available exclusively at Canada's facilities located in the NCA. All documents developed and/or updated by each Real Property Project Management resource must be provided to the Project Authority for review, approval and signature (where required). The Project Authority or other authorized PSPC representative must at all times have access to the Work processed by the Contractor.

## **PR 7 CLIENT SUPPORT**

The Client will provide all documents and information necessary for the Work.

## **PR 8 OFFICIAL LANGUAGES**

Canada performs work in both official languages – French and English. While proposed resources must be fluent in English, there will be a requirement for specific resources to be fluent in French and English. Fluent means that the individual must be able to communicate orally and in writing without any assistance and with minimal errors.

Each Task Authorization issued by the Project Authority will provide the language requirement for each proposed resource.

Therefore, the Contractor must have a minimum of one available resource at all times with the overall capability to provide bilingual (French and English) services, orally and in writing.

## **PR 9 WORK LOCATION**

Work locations will vary across the NCA depending on the requirements. The Contractor's resources may be required to work onsite at PSPC site offices or project site locations in the NCA depending on the requirements identified on the Task Authorization issued. PSPC will not charge the Contractor rent for the work space.

Normal security requirements accesses to PSPC workplaces and identified databases or applications resident on PSPC computers or networks will be provided by PSPC to specified resources for the sole purpose of executing the tasks associated with this contract. PSPC, at its sole discretion, will identify the nature and security characteristics of such accesses.

PSPC will not provide cellular phones.

## **PR 10 TRAVEL**

The Contractor's resources may be required to visit facility site locations and construction sites outside of the NCA. No travel related expenses or living expenses will be provided for travel to or from PSPC offices or sites within the NCA. Travel and living expenses for work, requested and pre-approved by the Project Authority, outside the NCA will be reimbursed at cost, as per approved National Joint Council Travel Directive rates located at: <http://www.njc-cnm.gc.ca/directive/travel-voyage/index-eng.php>.

## **PR 11 NO RESPONSIBILITY TO PAY FOR WORK NOT PERFORMED DUE TO CLOSURE OF GOVERNMENT OFFICES**

Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract, and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.

If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises.

## **PR 12 HERITAGE CHARACTER**

Several PSPC buildings and assets are designated "Classified" or "Recognized" due to their architectural quality and important historical associations.

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

More information can be found online at: <https://www.pc.gc.ca/en/culture/beefp-fhbro/introduction>

## **PR 13 APPLICABLE DOCUMENTATION**

There are numerous reports and reference materials for the various Programs of Work that will be made available to the PMSS Resources, who must review and understand them to provide the required level of support.

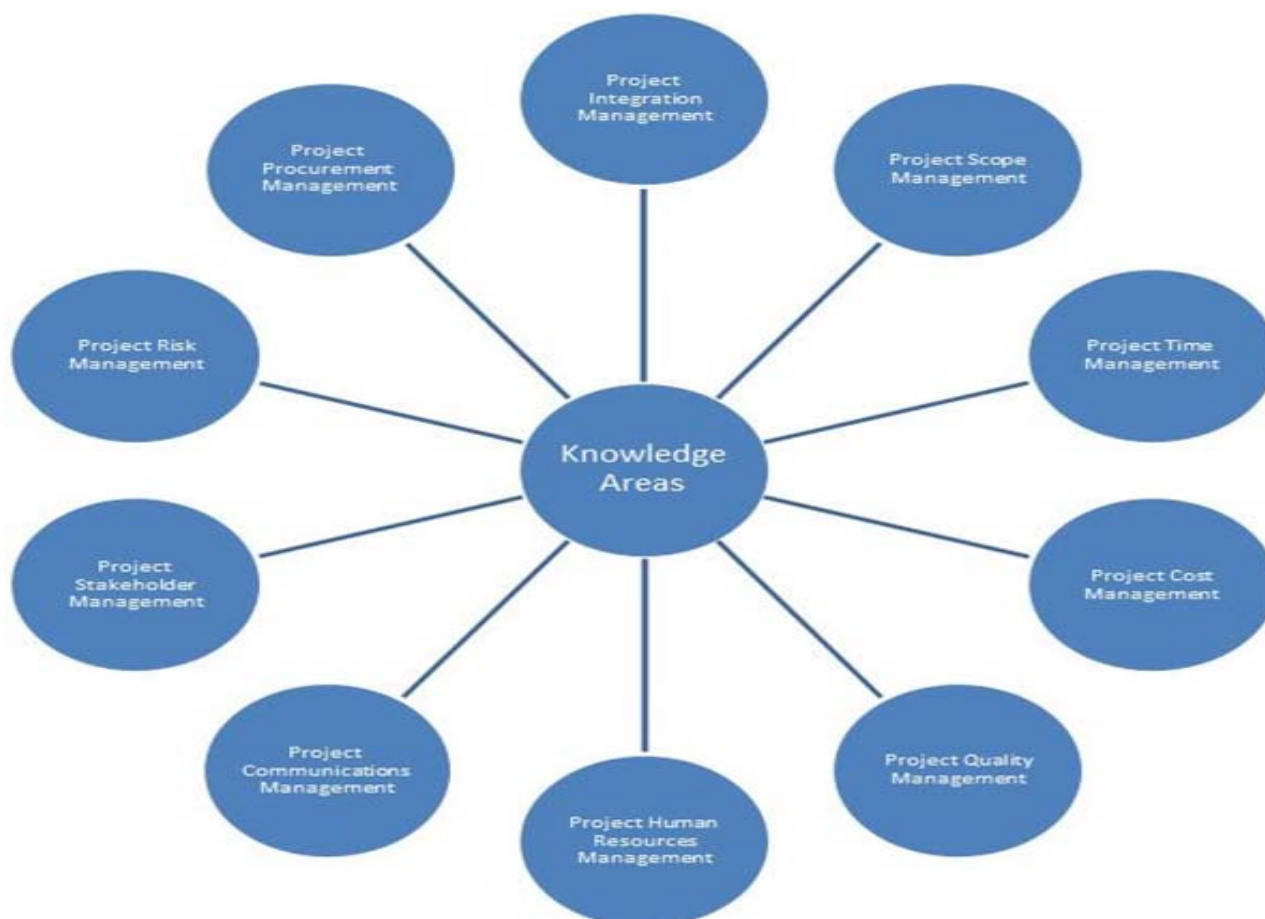


The following website is also available for online research:

- General Information about Real Property Services: <https://www.tpsgc-pwgsc.gc.ca/services/bns-prprt-eng.html>

#### PR 14 PROJECT MANAGEMENT SUPPORT SERVICES (PMSS)

The following figure illustrates the overall scope of technical expertise that will be required for the delivery of the complete life-cycle of RPS Programs of Work and its sub-projects.



The Contractor must ensure the PMSS Resources have the expertise, experience, and competencies necessary to provide all of the services and administration as identified in this document, including but not limited to:

- Comprehensive project leadership, management and project administration services;
- Heritage conservation project leadership and management;
- Financial analysis;
- Cost planning and control;



Solicitation No. – N° de l'invitation  
EN439-211126  
Client Ref. No. – N° de réf. du client  
20211126

Amd. No. – N° de la modif.  
File No. – N° du dossier  
FK292.EN439-211126

Buyer ID – Id de l'acheteur  
FK292  
CCC No./N° CCC – FMS No./N° VME

- 
- Schedule planning and control;
  - Quality assurance management;
  - Risk management;
  - Contract management;
  - Design and construction management;
  - Construction events logistics co-ordination to forecast and manage work disruptions with the parliamentary operating environment and other projects;
  - Change Order management and control, including unique PSPC approval process;
  - Comprehensive project monitoring and reporting;
  - Communications and technical writing support for written reports and “deck” presentations;
  - Documents and records management;
  - Security requirements management;
  - Minutes of meetings;
  - Document management and collaboration tools;
  - Documentation organization, management and control both in house and on behalf of the entire PSPC team and offices; and
  - Claim management.

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

## **PROJECT ADMINISTRATION (PA)**

### **PA 1 GENERAL REQUIREMENTS**

The following administrative requirements apply during all phases of project delivery and throughout the duration of the Contract.

#### **1.1 PSPC Project Directors (PD) and PSPC Project Managers (PM)**

The PSPC Project Directors (Departmental Representative) and Project Managers hold the following tasks:

- Administer programs, work or related projects;
- Exercise continuing control over the projects during all phases of development;
- Responsible for the program of work; and
- Responsible for the project progress on behalf of PSPC.

#### **1.2 Correspondence Protocol**

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

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

#### **1.3 Media**

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

The Contractor must ensure that no PMSS Resources (including any Subcontractors, Contractors or Associates) grants interviews with the media.

#### **1.4 Security Related to Program and Project Information**

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

#### **1.5 Anticipated Level of Effort**

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

During the implementation of the Programs of Work, it is anticipated that there may be times where an increased and/or decreased level of effort is required as a result of project approvals, reviews

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and/or other extenuating circumstances. This may result in a change to the overall required level of effort for the PMSS Resources.

## 1.6 Scheduling Work

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

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

## 1.7 Official Languages

Canada performs work in both official languages – French and English. While proposed resources must be fluent in English, there will be a requirement for specific resources to be fluent in French and English. Fluent means that the individual must be able to communicate orally and in writing without any assistance and with minimal errors.

Each Task Authorization issued by the Project Authority will provide the language requirement for each proposed resource.

Therefore, the Contractor must have a minimum of one available resource at all times with the overall capability to provide bilingual (French and English) services, orally and in writing.

## 1.8 Project Deliverables

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

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

### 1.8.1 PMSS Monthly Reports

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

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

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

### 1.8.2 Schedule Monthly Report

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

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

## 1.9 Acceptance of PMSS Deliverables

PSPC reserves itself the right to reject work or deliverables that it does not deem satisfactory.

### 1.10 Response Time

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

### 1.11 Program and Project Meetings

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

#### Types of Meetings:

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

The Project Authority will chair the Project Management Team meetings to coordinate and direct the activities of the Project Management Team. This is the umbrella meeting at which all Project Management Team decisions and directions will be communicated and recorded. The PMSS Resources must prepare and issue minutes within forty-eight (48) hours of these meetings. The objective of Project Management Team meetings is to:

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

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

#### 1.12 Risk Management Sessions

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

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

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The PMSS Project Managers (PM) must be able to develop, maintain and actively manage a Risk Management Plan per project as part of the Required Services. The PMSS SPL must be able to roll these risk plans into a summary risk assessment for the various Programs of Work.

PSPC will pay for a third party facilitator for these sessions if it deems it necessary.

### **1.13 Work Location**

Work locations will vary across the NCA depending on the requirements. The Contractor's resources may be required to work onsite at PSPC site offices or project site locations in the NCA depending on the requirements identified on the Task Authorization issued. PSPC will not charge the Contractor rent for the work space.

Normal security requirements accesses to PSPC workplaces and identified databases or applications resident on PSPC computers or networks will be provided by PSPC to specified resources for the sole purpose of executing the tasks associated with this contract. PSPC, at its sole discretion, will identify the nature and security characteristics of such accesses.

PSPC will not provide cellular phones.

### **1.14 Construction Activity and Review**

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

### **1.15 Change Management**

The Contracting Authority, PSPC's Real Property Contracting Directorate (RPCD), must authorize Amendments/Change Orders to consulting/construction contracts. The Contractor must prepare a proposed contract amendment 'Short Form' for endorsement by the RPS PM and/or RPS PD and then submit to RPCD for approval prior to the issuance of all amendments and Change Orders. The Short Form must detail the scope or nature of the change along with relevant contracting information such as; why this change is necessary; upset limit of the cost of the contemplated change, cost of the contract changes to date and all related information.

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

A fully documented Amendment or Change Order is then submitted to RPCD for their review and written approval. The approved Amendment or Change Order then formally becomes part of the contract and contract file. The submitted Amendment or Change Order is to include the approved Short Form that indicates the scope/Statement of Work or services, complete with:

- A final and detailed quotation from the resource or contractor on which the PSPC PM has provided his or her written recommendation that the scope and price is fair, reasonable and technically compliant;

- In the case of construction contracts, the approval from the A&E Team's PD that he/she and his/her consultant team is in agreement with the scope and contractor's quoted price; and
- All related correspondence.

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

In addition to the above, the PSPC has its own quality control and contracting approval process. This process requires RPS–NCAPD management validation to entail that the proposed contract changes are appropriate.

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

## **PA 2 PROJECT TEAMS**

### **2.1 Project Team Organization**

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

### **2.2 Roles and Responsibilities of the Project Team**

#### **2.2.1 Project Director**

The Project Director (PD) is accountable for the expenditure of public funds, and the delivery of a program of work and related projects in accordance with terms accepted by the appropriate level of government. The Project Director reports to *senior* PSPC–RPS executive management and is the formal point of contact with the Client / Users.

#### **2.2.2 Client / Users Representatives (Client)**

The tenant or client department also referred to in this document, as the Client / Users, will have input to all projects as the implementation of each will have a direct effect on their operations.

#### **2.2.3 PSPC *Senior* Communications Advisor**

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

#### **2.2.4 PSPC Project Manager**

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

#### **2.2.5 Project Management Support Services (PMSS) Resources**

The PMSS Resources provide support services to PSPC on behalf of the Contractor, and must work with and provide full coordination of services with that of the Project Director, the Project

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Team, the Client / Users, the A&E Team, other contractors, authorities with jurisdiction, and others in accordance with the required services identified in this document.

#### 2.2.6 A&E Teams

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

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

#### 2.2.7 General Contractors

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

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

#### 2.2.8 PSPC Property Manager

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

#### 2.2.9 PSPC Technical Resources

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



## 2.2.10 Heritage Conservation Directorate (HCD)

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

## 2.2.11 PSPC Commissioning Manager

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

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

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

## PA 3 SUBMISSIONS, REVIEWS AND APPROVALS PROCESS

### 3.1 Authorities Having Jurisdiction

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

Authority	Federal Government Jurisdiction
Treasury Board Secretariat	Project and Contract approvals
Public Works and Government Services Canada	Contracting authority, project delivery, fire prevention engineering services, and life safety
Client Departments (Principal User)	Functional design requirements and standards, Multimedia, IT, Security systems
Environment Canada	Canadian Environmental Assessment Act and Canadian Environmental Protection Act
National Building Code	Building codes and standards

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

Authority	Jurisdiction
Ontario Ministry of Labor	Employment Standards, Construction Safety, Designated Substance Management, Workers Compensation
Ontario Ministry of the Environment	Environmental Protection Act: 3R Regulations, Building Discharges into the air, water and ground, Disposal of Designated Substances, including Asbestos
Ontario Ministry of Consumer and Commercial Relations – Technical Standards and Safety Authority (TSSA)	Construction Hoists, Elevators, Escalators and Dumbwaiters, Pressure vessels
City of Ottawa	Building and Plumbing Permits and Inspection, Fire Safety, Equipment and access for fire-fighting equipment
Ontario Electrical Safety Authority	Electrical Permits and Inspection
National Capital Commission (NCC)	Responsible for planning, as well as taking part in the development, conservation and improvement of Canada's Capital Region
Federal Heritage Building Review Office (FHBRO)	Role is to advise custodian departments on how to meet their heritage obligations under the Treasury Board Policy on Management of Real Property

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

### 3.2 Health and Life Safety

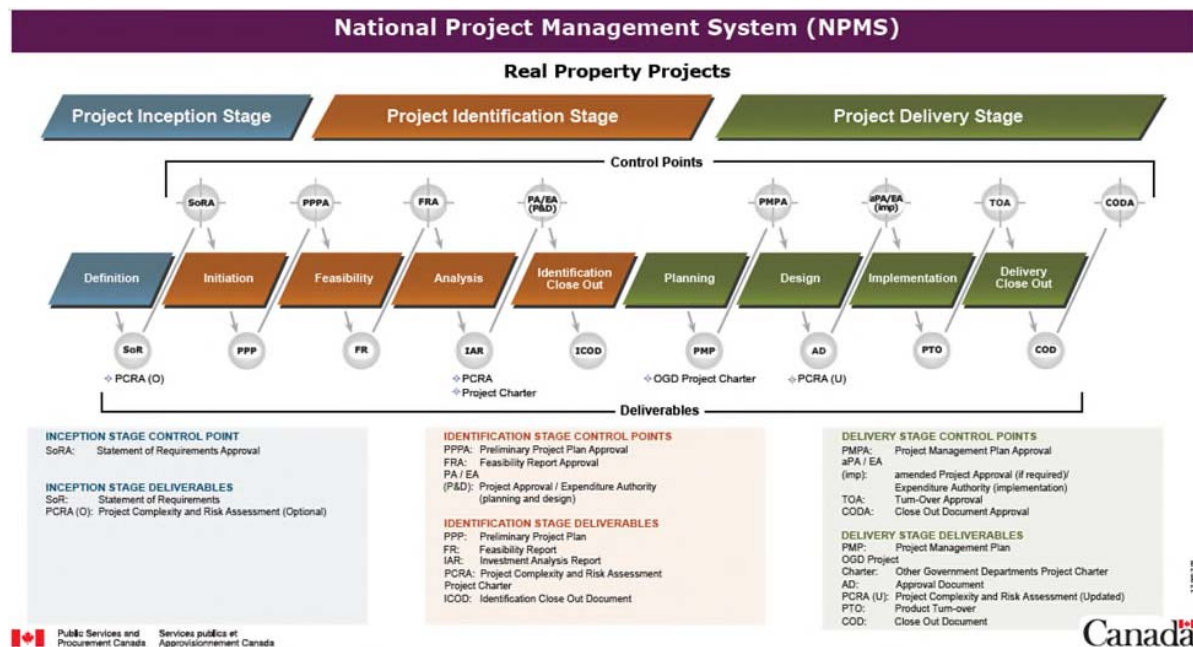
PSPC recognizes the responsibility to ensure the health and safety of all persons on Crown construction projects and the entitlement of both federal employees and private sector workers to the full protection afforded to them by occupational health and safety regulations.

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

### PA 4 PSPC NATIONAL PROJECT MANAGEMENT SYSTEM (NPMS) MODEL

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

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



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

**The Project Inception Stage:** The purpose of the Inception Stage is to provide a forum for vetting project proposals to ensure that proposed projects are in keeping with PSPC portfolio strategies and respond in the most effective manner possible.

**The Project Identification Stage:** The purpose of the Identification Stage is to ensure that a project or a program of work submitted for project approval/expenditure authority (planning and design) has been adequately developed and analyzed in the context of the PSPC Program and Centralized Portfolio management and represents the best investment solution.

The project identification stage can also assist our custodian clients in identifying and developing the most appropriate projects for their departmental objectives and in support of the government agenda for real property, business projects and information technology.

**The Project Delivery Stage:** The purpose of the Project delivery stage is to translate the approved project objectives and requirements into technical criteria to allow for detailed design and full implementation of the end product.

## REQUIRED SERVICES (RS)

The required and optional resource categories for this project are indicated in **ANNEX A, TABLE 1, REQUIRED AND OPTIONAL RESOURCES**, below and are divided into the 4 workstreams. These Services apply to the entire Real Property Services Programs of Work, including related projects. Services must be provided in accordance with the requirements identified in the National Project Management System (NPMS).

### RS 1 GENERAL SERVICES

ANNEX A TABLE 1 REQUIRED AND OPTIONAL RESOURCES				
#	Resource Category and Level	Estimated Number of Required Resources	Estimated Number of Optional Resources	Total
<b>WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES</b>				
1	Portfolio Planner for Real Property – <i>Senior</i>	2	2	4
2	Project Administrator for Real Property – <i>Intermediate</i>	1	2	3
3	Project Leader for Real Property – <i>Senior</i>	2	11	13
4	Project Leader/Executive for Real Property – <i>Senior</i>	1	0	1
5	Project Manager for Real Property – <i>Senior</i>	21	9	30
6	Project Manager for Real Property – <i>Intermediate</i>	17	2	19
7	Project Manager for Real Property – <i>Junior</i>	5	2	7
8	Project Planner for Real Property – <i>Senior</i>	2	3	5
9	Project Scheduler for Real Property – <i>Senior</i>	1	0	1
10	Technical Writer for Real Property – <i>Senior</i>	1	0	1
<b>TOTAL</b>		53	31	84
<b>WORKSTREAM 2 - Project Finance and Performance Management</b>				
11	Claims Analyst – <i>Senior</i>	1	0	1
12	Financial/Cost Specialist – <i>Senior</i>	4	4	8
13	Procurement Specialist – <i>Senior</i>	1	1	2
14	Quality Assurance/Management Specialist – <i>Senior</i>	1	0	1
15	Risk Management Specialist – <i>Senior</i>	2	3	5
<b>TOTAL</b>		9	8	17
<b>WORKSTREAM 3 - BUSINESS CONSULTING AND CHANGE MANAGEMENT</b>				
16	Business Consultant – <i>Senior</i>	3	4	7
17	Change Management Consultant – <i>Senior</i>	1	1	2
18	Communications Consultant – <i>Senior</i>	1	1	2
19	Communications Consultant – <i>Intermediate</i>	1	1	2
20	Organizational Development Consultant – <i>Senior</i>	1	0	1

Solicitation No. – N° de l'invitation  
EN439-211126  
Client Ref. No. – N° de réf. du client  
20211126

Amd. No. – N° de la modif.  
File No. – N° du dossier  
FK292.EN439-211126

Buyer ID – Id de l'acheteur  
FK292  
CCC No./N° CCC – FMS No./N° VME

<b>TOTAL</b>		7	7	14
<b>WORKSTREAM 4 - SPECIALIZED CONSULTING</b>				
21	Professional Architectural/Engineering Consultant – <i>Senior</i>	1	0	1
22	Project Manager for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields – <i>Senior</i>	1	0	1
23	Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields – <i>Senior</i>	1	2	3
24	Project Manager for Real Property with Technical Expertise in High-Level Security Requirements – <i>Senior</i>	1	2	3
<b>TOTAL</b>		4	4	8

## 1.1 Scope and Activities

The Contractor must provide project management support services, in accordance with the best practices of the Project Management Institute (PMI) and the National Project Management System (NPMS), to the PSPC's Project Directors, Departmental Representative and Project Managers including but not limited to; manage project activities, review project scope, resolve issues, coordinate design and project support activities, control costs and schedules, develop and maintain documentation systems, administer contracts, manage design and construction, manage the transition for building occupancies, and the project final completion.

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

### 1.1.1 Optional Services

The optional resource categories for this project are indicated in **ANNEX A**, TABLE 1, REQUIRED AND OPTIONAL RESOURCES, above. The optional services will be limited to the Tasks and Responsibilities referred to in section RS 1 General Services 1.2. The Contracting Authority, through a written notice will identify the resource category(ies), quantity(ies) and level(s) of effort for any additional work required.

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

The **ANNEX A**, TABLE 1, REQUIRED AND OPTIONAL RESOURCES outlines the resource categories, levels and estimated number of PMSS personnel required and optional, throughout the duration of the Contract. A description of the Tasks and Responsibilities for the required and optional resources are listed below.

### WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES

#### 1.2.1 Tasks and Responsibilities - Portfolio Planner for Real Property – *Senior*

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

- Analyzing external economic, land use and real estate market trends (environmental trends);
- Examining and interpreting the local and community policies, plans and by-laws;
- Identifying the impact of anticipated environmental trends on an organization's real estate portfolio;
- Developing building and space accommodation standards for an organization;
- Developing organizational policies concerning the use of real property;
- Identifying future space requirements of an organization and analyzing alternative solutions to meet such requirements;
- Preparing profiles of existing building and portfolio condition, performance and utilization;
- Identifying any potential problems a real estate portfolio presents in meeting organizational goals (e.g. strengths/ weaknesses/ opportunities/threats analysis);
- Comparing the performance of a portfolio or real property organization with its past performance, private sector industry and government comparable;
- Developing real property strategies to meet the organization's goals, accommodation requirements or real property "custodial" responsibilities;
- Developing strategies to rationalize or dispose of a group of real property;

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- Prioritizing numerous real property projects (e.g. maintenance, renovation / retrofit, tenant improvement, disposal, acquisition, etc.) in keeping with an organization's strategic goals and abilities;
  - Preparing real estate development strategies and real property Master Plans;
  - Preparing land use studies analyzing development initiatives or opportunities (e.g. examining transportation and servicing issues); and
  - Developing a communications plan to public and media lines of inquiry.

#### 1.2.2 Tasks and Responsibilities - Project Administrator for Real Property - *Intermediate*

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

- Assisting project team in all management activities including financial, planning and contracting aspects;
- Providing financial administrative support to suit requirements;
- Assisting with security clearance processes;
- Establishing project administration procedures;
- Providing administrative and technical support of a clerical nature as required to a project team;
- Assisting in performing such tasks as maintaining project documentation and records
- Developing document and records management system and control process for project teams;
- Receiving incoming mail (both hard copy and e-mail), prioritizing and assessing urgency of mail, and setting deadlines;
- Developing/maintaining bring forward (BF) and other control systems for action items
- Researching and locating background information, analyzes, extracts relevant information and writes summaries
- Maintaining and tracking financial transactions, enters commitments and expenditures into the project's financial budget.
- Acting as the first point of contact in a "hot-line" situation by accepting incoming calls, logging calls, attempting to resolve simple issues and following established procedures for more challenging complications;
- Tracking project change requests
- Participating at project meetings, preparing/distributing minutes and records of decision;
- Providing comprehensive project planning and monitoring, reporting using project plan format;
- Maintaining and updating relevant project information in manual and/or electronic files; project information could include such things as project activity schedule, status reports, correspondence;
- Communicating with project management on administrative matters related to the project;
- Assisting with the review of project requirements with specialists, other jurisdictional authorities and stakeholders;
- Assisting in the preparation and coordination of documentation in response to scheduled and unscheduled reports, returns and observations to update management of project progress;
- Providing technical writing support for written reports and presentation decks;
- Assisting in managing request for information (RFI) procedures;
- Providing support to tendering and contracting processes as requested;
- Supporting start-up construction process (preparation & meeting) by assisting in managing construction logistics: forecasting, coordinating work, and avoiding disruptions to occupants;
- Providing support in the preparation of timely and accurate Contemplated Change Notices (CCN) and Change Orders (CO) for approval, tracking and communications; and
- Supporting post-construction services and post-construction evaluations.



Further services include, but are not limited to, the following:

- Developing and maintaining NPMS checklist to ensure each project is NPMS compliant;
- Managing documents for the PSPC and PMSS Project Managers such as Change Order docket preparation, setting up project document storage and management systems, document filing, document management, and document security. Document management is to include library support, historical recording type work, office documents, meeting minutes, reports, files, drawings (as-built records, etc.) in accordance with PSPC Records Management sector requirements;
- Developing and maintaining logs for each contract;
- Assisting with preparation submissions, project briefing notes, progress status reports, project quality reports, monthly reports, quarterly reports, and NPMS documents;
- Using and managing online collaboration tools;
- Assisting with the preparation of formal Statement of Work, work breakdown structure and evaluation materials;
- Preparing and coordinating documentation in response to reports and observations to update management of project progress;
- Contributing to research and analysis and carrying out fact finding activities for projects and discipline areas;
- Acquiring, reviewing, recording, verifying and maintaining inputs, various data and information;
- Managing and maintaining electronic and manual files, and maintaining a library of reference materials;
- Setting electronic folders system in accordance with the NPMS standard filing system;
- Responding to internal and external inquiries;
- Providing office support services for architectural and engineering drawing management and other various e– business office management processes using tools such as word processing (MS Word), spreadsheet (MS Excel), presentations (MS PowerPoint and MS Visio), and document scanning (Adobe PDF documents and JPEG images);
- Supporting and assisting PMs in administrative functions;
- Performing administrative tasks and participating in decision making related to the planning and organization of work activities; and
- Assisting PMs in filing/recording project documents.

### 1.2.3 Tasks and Responsibilities - Project Leader for Real Property – Senior

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

During the various NPMS stages of the assigned projects, the SPL must participate in project development, project identification, project delivery, technical project management and technical administration support by working with project managers, consultants and clients to provide integrated project management services.

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

- Assessing the organization's capacity/capability to undertake and successfully deliver a project in the context of the overall program or portfolio program or portfolio priorities through strategic planning;
- Specifying the general requirements of the project: developing, verifying and gaining acceptance of the project scope, budget, schedule and scope change control;



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- Advising *Senior* Management on a range of issues affecting the organization's ability to achieve the project's business objectives;
  - Assisting in the prioritization and assignment of projects within a larger program or portfolio of projects;
  - Identifying and assigning project roles, responsibilities and reporting relationships, developing work plans, ensuring adequate human resources, and developing a productive team environment;
  - Managing several *Senior* Project Managers, each responsible for an element of the project/program/portfolio and its associated team (e.g. project and financial management);
  - Meeting with organizational executives to ensure all organizational (internal and external) stakeholders are committed to moving forward on the project (e.g. opportunity evaluation);
  - Meeting, negotiating and gaining support from internal and external organizational stakeholders (for example *senior* government executives, private-sector interests, municipal interests, community groups, etc.);
  - Assisting in obtaining required project approvals from relevant stakeholders (internal approval, zoning, heritage, etc.) including the review and interpretation of municipal by-laws;
  - Undertaking due diligence activities for the acquisition or disposal of property (for example highest & best use studies, site selection studies);
  - Developing real property master plans, detailed site development plans or land use plans analysing development initiatives (for example transportation or servicing studies, analysis of traffic, parking, pedestrian activity, transportation demand management or other urban planning issues);
  - Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified project, program or portfolio elements to solve these problems, and obtaining approval thereof;
  - Managing the implementation of a project/program/portfolio to identify, analyze, plan, track and control progress on a continuous basis;
  - Making recommendations and providing advice for improvements and assisting in developing solutions and implementing recommendations (e.g. policy development and standards development);
  - Managing safety as an integrated part of the construction project following accountability frameworks and documentation to ensure consistency of practice and due diligence;
  - Preparing and presenting findings, status and other relevant matters;
  - Preparing offer call documents to be used in property acquisition or disposal;
  - Preparing life-cycle cost estimates using the discounted cash-flow method and sensitivity analysis;
  - Examining and making recommendations concerning land title issues;
  - Identifying, obtaining and managing environmental approvals, permits or licenses;
  - Overseeing the development of a Project Business Case (e.g. business planning and program review);
  - Managing Program changes in accordance with the change management process;
  - Motivating the team to ensure commitment to the program's objectives;
  - Specifying the general requirements of the project;
  - Developing project alternatives and identifying their administrative, economic, and technical feasibility and practicality, and associated policy and organizational change requirements;
  - Planning, directing, and controlling the activities of a project team within scheduled time and cost parameters;
  - Producing overall project plans and obtaining approval of preliminary analysis;

- Updating and providing briefings to upper management on progress and concerns of the project/program of work;
- Assisting in organizing media events or building tours for the public or *senior* management; and
- Producing camera-ready graphics of communication material or information panels for on-site exposition.

Further services include, but are not limited to, the following:

- Providing strategic analysis and expert advice for integrated management services;
- Providing strategic advice for major renovation to heritage and national historic properties, including delivery options and procurement approaches;
- Providing advice and leadership in the development and assessment of potential options on project development and implementation strategies that should be explored, including the methods and mandate for proceeding;
- Recommending a preferred option and developing an implementation strategy through the preparation of a business case or feasibility study;
- Developing the options analysis providing necessary data and descriptions, cost benefit and risk analysis for each identified option and a supportable recommendation of the most appropriate selection;
- Developing risk management plans;
- Formulating and preparing Investment Analysis Reports and other project approval documents, identifying and defining in details the optimum solution, establishing a project budget, completion date and required controls;
- Formulating, organizing, and delivering convincing and concise messages;
- Developing and preparing the project definition, and obtaining sign-off by PSPC Real Property Services, which has established conditions for the planning and implementation of projects;
- Developing a Communications Plan that outlines the claims resolution process;
- Developing a Communications Plan, press releases and questions and answers to media lines of inquiry;
- Preparing and monitoring of Memorandum of Agreements, Memorandum of Understanding, and transfer of furniture and equipment agreements, as required;
- Recommending the resource levels and competencies required to deliver RPS Programs of Work and related projects; developing work plans, schedules and budgets, monitoring progression of the work and initiating measures to respond to changing circumstances and ensuring achievement of scope, cost, time and quality requirements;
- Reviewing and accepting (or requesting changes to) the overall planning, design development and implementation process, including feasibility, environmental and other studies, conceptual designs; the associated class of cost estimate; project scheduling; project changes; issues management; approval requirements; and reporting for each project within the RPS Programs of Work;
- Obtaining, analyzing and synthesizing information from various parties involved in the delivery of projects and developing reports and briefing materials, including identification of issues together with recommendations to address identified issues;
- Providing leadership to the multidisciplinary specialists and consultants required to deliver RPS Programs of Work and related projects;
- Reviewing the co-ordination of work on individual projects within the RPS Programs of Work;
- Assessing the potential efficiencies of having individual projects inter-collaborate and taking advantage of these efficiencies;
- Assessing alternatives and establishing project goals, priorities, performance indicators and milestones;

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- Chairing meetings with clients, team members and other managers, consultants and other stakeholders to review and analyze the delivery of project needs;
  - Reviewing and contributing to the development of cost estimates, cost benefit, and risk management analyses and contingency plans, and proposes alternative approaches to optimize costs and minimize risk in the delivery of the Programs and projects;
  - Reviewing the development of project forecasts and budgets. Managing and monitoring the RPS Programs of Work and related projects budgets and adjusting to meet changing requirements, minimizing risk and optimizing resource utilization; and
  - Conducting the commissioning stage of the project, verifying that the project complies with the criteria in both the Investment Analysis Report and Project Brief

#### 1.2.4 Tasks and Responsibilities - Project Leader/Executive for Real Property – *Senior*

The *Senior* Project Leader/Executive (SPLE) must provide overall leadership and direction to other PMSS Resources. The SPLE must work closely with the Departmental Representative, PSPC Project Managers and the PMSS Project Managers, forming a core PM team.

They have the responsibility to lead the project through the entire National Project Management System (NPMS) lifecycle from the Inception Stage to the Delivery Stage close out, seek approval and funding to implement the project and overall leadership of the project team. This includes on-going monitoring to ensure the project is within funding approval levels with support of financial analyst.

They must participate in project development, project identification, project delivery, technical project management and technical administration support by working with project managers, consultants and clients to provide integrated project management services.

The SPLE is the prime overall consultant contact during the life of the project.

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

- Acting as the main liaison between the contractors' resources assigned to the project and the Project Authority;
- Managing several Project and *Senior* Project Managers, each responsible for an element of the project/program/portfolio and its associated project team (for example, project and financial management);
- Managing a team of the contractors' resources assigned to the project and motivating them to ensure commitment to the project/program as required;
- Managing the implementation of a project/program/portfolio to identify, analyze, plan, track and control progress on a continuous basis;
- Providing advice and acting as a subject matter expert in the areas of Real Property Branch (RPB) acquired services, as well as real property project delivery, commissioning, quality management, dispute resolution and relationship management;
- Assessing the organization's capacity/capability to undertake and successfully deliver a project in the context of the overall program, portfolio program, or portfolio priorities through strategic planning;
- Ensuring that *senior* management is informed of issues and progress through regular communication, meetings, and status reports;
- Participating in working group meetings internally and externally;
- Meeting with other organizational executives to ensure all organizational (internal and external) stakeholders are committed and moving forward on project and organizational goals;

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- Making recommendations and providing advice for business improvement processes and programs, assisting in developing solutions, and implementing recommendations;
  - Updating and providing briefings to upper management on progress and concerns of the project;
  - Planning, directing, and controlling the activities of a project team within scheduled time and cost parameters;
  - Formulating statements of problems; establishing procedures for the development and implementation of significant, new or modified project, program or portfolio elements to solve these problems, and obtaining approval thereof;
  - Producing overall project plans and obtaining approval of preliminary analysis;
  - Assisting in the definition of insurance and risk management requirements;
  - Defining and documenting project objectives;
  - Ensuring alignment of requirements with PSPC policy objectives;
  - Liaising with and interviewing RPB stakeholders, particularly the National Centers of Expertise and the Acquisition Branch authorities to obtain, clarify, and exchange information on real property project delivery requirements;
  - Working with the PSPC Risk Management specialists in anticipating and developing requirements to respond to service delivery risks, and interfacing with departmental authorities on a regular basis in support of project planning and scheduling;
  - Producing draft project delivery strategies, transition planning and oversight strategies, providing commissioning advice, quality management guidance, and dispute resolution advice which could be used to inform RFP's for construction and other related services;
  - Giving briefings on progress and issues related to risk management, project delivery, commissioning, quality management, dispute resolution, and relationship management requirements;
  - Assisting in the analysis of baseline performance data and reports to support benefits realization tracking;
  - Assisting in the prioritization and assignment of projects within the program/portfolio;
  - Overseeing the development of a Project Business Case (for example business planning and program review);
  - Managing Program changes in accordance with the change management process;
  - Developing project alternatives and identifying their administrative, economic, and technical feasibility and practicality; as well as their associated policy and organizational change requirements;
  - Determining budget requirements;
  - Working with a variety of project management tools;
  - Preparing and finalizing Project sign-offs.
  - Assisting in the development of evaluation approaches and criteria for selected areas of responses to RFPs;
  - Assisting in monitoring transition, implementation and oversight activities following contract awards; and
  - Assisting in the development of the service management and service administration approach for contract management post contract award.

Further services include, but are not limited to, the following:

- Preparing and presenting findings, status and other relevant matters;
- Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems;

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- Preparing briefing notes, presentations, and decision papers related to insurance and risk management, and final draft position papers on project services, commissioning, quality management, dispute resolution and relationship management;
  - Documenting results from liaison with stakeholders in the form of discussion papers, emails and briefings (with presentation decks) as appropriate;
  - Drafting documents and memos to be used to seek approvals as appropriate;
  - Presenting decks on progress and issues as well as recommendations on how to address them;
  - Documenting detailed requirements for inclusion in Statements of Work (SOWs) for construction projects and other related services;
  - Writing and presenting monthly progress reports on assigned activities identifying potential risks, accomplishments and challenges; and
  - Providing to the Project Authority, bi-weekly verbal progress reports on assigned activities.

#### 1.2.5 Tasks and Responsibilities - Project Manager for Real Property – *Senior*

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

During the various NPMS stages of the assigned projects, the PMSS *Senior* Project Managers will participate in project development, project identification, project delivery, technical project management and technical administration support by working with project managers, consultants and clients to provide integrated project management services.

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

- Developing project scope, requirement documents, statement of work, participating in client discussions, analysing the functional and operational requirements of the client;
- Preparing project approval documents (e.g. business cases, feasibility studies, Treasury Board submissions) required for funding or project approval;
- Planning and coordinating the activities of project personnel, contractors or other support providers, including the preparation of preliminary time schedules for project design and implementation;
- Managing architectural/engineering and associated specialist teams, reviewing project costs and resolving variances with predetermined budgets by recommending action and resolving conflicts;
- Planning, directing and coordinating a project management office and its activities within time and cost parameters;
- Preparing formal work breakdown structure and compliance charts;
- Producing draft plans and sections for incorporation into the project implementation plan, and other project plans;
- Preparing draft evaluation plans, criteria and evaluation schedule;
- Defining and documenting development team objectives;
- Contributing to the organization's strategic and business planning initiatives (e.g. identifying strategic goals and implementing initiatives to achieve them, such as through policy development, standards development and program review);
- Recognizing and acting on opportunities to combine professional resources through partnering arrangements (e.g. multi-disciplinary practices);

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- Planning facilitation workshops that address strategic planning, teambuilding, positive-centered learning or conflict management, and conducting stakeholder interviews. Preparing workshop material, facilitating the workshop, and on-going partnering process management;
  - Preparing or managing of project documents, such as project charter or plan, client statement of work, investment analysis report, feasibility study, terms of reference, value engineering, life cycle analysis, commissioning plan or lessons learned;
  - Establishing and reviewing project and construction implementation strategies including, lump sum, phased, construction management, design-build and public-private partnerships;
  - Coordinating consultants retained separately to ensure an integrated design (for example, geotechnical, seismic and environmental designs, functional program and fit-up/office planning);
  - Briefing consultants and contractors on roles, responsibilities and guidelines for contract administration and on-site behavior;
  - Developing an updated project plan, noting constraints, assumptions, inclusions and exclusions after review with stakeholders;
  - Coordinating Value Engineering exercises or other strategies aimed at integrated design solutions and cost management; ensuring the review and implementation of outcomes from these processes;
  - Maintaining the design change management process that records changes to the scope of work;
  - Monitoring the design, implementation and operations of the project against established goals, objectives and milestones;
  - Reporting progress of the project on an ongoing basis and at scheduled points in the life cycle;
  - Meeting with stakeholders and other project managers and stating problems in a form capable of being solved;
  - Assisting in the preparation of recommendations to engage or commission consultants, preparing consultants Request for Proposal (RFP) documents and reviewing and evaluating consultants proposals;
  - Reviewing monthly progress claims from consultants for compliance with consultants agreements and recommending payments;
  - Analyzing project schedules including contractor or consultants deliverables and determining whether corrective action is required to meet deadlines;
  - Attending construction site meetings, providing input on interpretation of contract plans and specifications while ensuring that consultants and contractors fulfill their responsibilities under their respective agreements;
  - Preparing plans, charts, tables and diagrams to assist in analyzing or displaying problems;
  - Working with a variety of project tools;
  - Formulating and maintaining master schedule of all activities and resources by defining deliverables, identifying key milestones and deadlines, reviewing project progress, and engaging in ongoing risk management;
  - Ensuring management staff is provided with timely and accurate project information and status updates;
  - Managing and planning moves, including furniture coordination, cabling and signage procurement and verification;
  - Coordinating and preparing documentation in response to scheduled and unscheduled reports, returns and observations to update management on project progress;
  - At substantial completion, participating in inspections or acceptance boards: inspecting the work, evaluating amounts withheld due to deficiencies, accepting the work on behalf of client, recommending issuance of the interim certificate and payment to the Contractor;



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- Incorporating final reports into the project plan, including details of outstanding issues, warranties and obligations of consultants or contractors, posting project reviews and lessons learned;
  - Ensuring that deficiencies and incomplete work are identified, managed, corrected and accepted as complete promptly;
  - Recommending issuance of Final Completion Certificate;
  - Developing project control and reporting procedures and managing changes in operational plan;
  - Conducting post project reviews and lessons learned;
  - Contributing to the organization's strategic and business planning initiatives (for example, identifying strategic goals and objectives and implementing initiatives to achieve them, Policy Development, Standards Development and Program Review);
  - Assuming leadership at the appropriate phases of planning, action, and evaluation;
  - Recognizing and taking action on opportunities to combine professional resources through partnering arrangements (for example, multi-disciplinary practices);
  - Contributing to development of organizational vision and mission;
  - Coordinates, drafts and prepares for signature formal project documents and reports; and
  - Developing and maintaining various systems for the management and control of the project in a manner compatible with client standards and guidelines. This includes financial, approval tracking, change management, communications, and security protocol for the project staff and records management system.

Further services include, but are not limited to, the following:

- Developing and maintaining project Work Breakdown Structure;
- Giving briefings on progress and concerns of project;
- Preparing required NPMS documents, including but not limited to feasibility study, Project Management Plan, IAR, etc.;
- Assisting the project manager or consultants design team in interpreting the project brief and in understanding department and other government department standards and policies;
- Establishing a team of professional and technical PM resources required to review design submissions while also ensuring a comprehensive reply at each step;
- Managing A&E Teams and other consultants;
- Monitoring A&E Teams and other consultants' deliverables and performances;
- Maintaining design and construction deliverable logs;
- Working with other project managers, consultants and clients to plan, schedule and execute the timely delivery of the RPS Programs of Work and related projects in accordance with approved deadlines and milestones;
- Developing and reviewing detailed project cost estimate in accordance with predetermined budgets/funding;
- Determining and obtaining budgetary requirements, composition, roles, responsibilities and terms of reference for the team;
- Developing and maintaining project cash flow;
- Providing cost (planning, estimating, and controlling) advisory and quality assurance services;
- Preparing option analyses and "what if" scenarios;
- Reviewing and challenging the estimates prepared by other consultants;
- Providing elemental cost analysis, risk analysis, life cycle costing, value engineering/management techniques and earned value management;
- Preparing on a monthly basis, project progress reports on project status, project schedules, project expenditures and impending actions to be undertaken;

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

#### 1.2.6 Tasks and Responsibilities - Project Manager for Real Property – *Intermediate*

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



The required services may include, but are not limited to, the tasks identified in section 1.2.5  
Project Manager for Real Property – *Senior*.

#### 1.2.7 Tasks and Responsibilities - Project Manager for Real Property - *Junior*

The *Junior* Project Manager is to provide assistance to the *Senior* and *Intermediate* Project Managers in all of their activities but to a lesser extent, where judgment and experience to be applied to project situations do not require the level of analysis and interpretation of a *Senior* and/or an *Intermediate* Project Manager.

The required services may include, but are not limited to, the tasks identified in section 1.2.5  
Project Manager for Real Property – *Senior*.

#### 1.2.8 Tasks and Responsibilities - Project Planner for Real Property – *Senior*

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

- Identifying project activities and creating and maintaining the project schedule, establishing a time control system, monitoring progress (including cost and schedule controls) and responding to variances;
- Formulating and maintaining master schedule of all activities and resources by defining deliverables, identifying key milestones and deadlines, reviewing project progress, and engaging in ongoing risk management;
- Identifying (seasonal, site or client) specific impacts on timelines, timelines for work processes and approval periods to master schedule;
- Developing detailed cash flows as the project progresses to illustrate the sequencing of work and the inter-related activities;
- Communicating verbally and in writing with the Project Manager and with stakeholders to input modifications to the project schedule or the project Work Breakdown Structure;
- Developing and maintaining project schedules, documentation and a Master Schedule of all projects and resources if more than one project
- Visiting the site and providing timely input to update the Master Schedule Plan;
- Preparing an optimized project schedule, using Critical Path Methodology, to identify measures to shorten total project duration;
- Reviewing and monitoring overall project schedule on a regular basis using information provided from the project team; mitigating schedule delays as required;
- Maintaining schedule tracking and change management records;
- Tracking the progress of the project including cost and schedule controls
- Documenting issues and resolutions related to the project schedule;
- Documenting and managing project and financial records as appropriate;
- Communicating with the Project Manager, management team and stakeholders regarding project status and deliverables using logic diagrams, bar charts and narrative reports; and
- Contributing to the development and management of processes and procedures used in operations.

Further services include, but are not limited to, the following:

- The Project Planner must deliver, control and maintain the following items:
- Program Master Schedule;
- Project Schedules;

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

#### 1.2.9 Tasks and Responsibilities - Project Scheduler for Real Property - *Senior*

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

- Developing and supporting project schedules;
- Producing appropriate reports and identifying scheduling and/or dependency issues;
- Conducting and providing critical path analysis;
- Assisting in schedule coordination efforts with internal and external project stakeholders; and
- Utilizing MS Project and/or other scheduling tools.

#### 1.2.10 Tasks and Responsibilities - Technical Writer for Real Property – *Senior*

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

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

## WORKSTREAM 2 - PROJECT FINANCE AND PERFORMANCE MANAGEMENT

### 1.2.11 Tasks and Responsibilities - Claims Analyst - *Senior*

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

- Reviewing and analyzing project background data and reports with respect to contract issues, i.e. claims, Change Orders, schedule reports, delays analysis, disputed issues, etc.;
- Providing a complete detailed analysis of the monthly project schedule submissions commencing at the beginning of the project construction;
- Reviewing contractors As Built Critical Path Schedule and compare to the original Baseline Plan/schedule;
- Analyzing where schedule delays occurred and defining critical/prime issues and causes (delay events) affecting the end date; and the impact of extension of time and; identifying concurrent delays;
- Providing a detailed project Delay Analysis;
- Identifying causes, circumstances and responsibilities (i.e. Contractor, Resource, PSPC) leading to delays and potential claims;
- Completing a Change Order analysis, including a review of Contemplated Change Notices (CCN) & Change Orders (CO). Include a history of each CO and identify if delays occurred, their extent and impacts on the end date of the project;
- Establishing costs incurred by the Crown as a result of contractor-caused delays;
- Analyzing delay impact and associated costs resulting from the cumulative effect of numerous Change Orders;
- Assisting the Project Manager in determining reasons why a contractor claims additional costs that have not been covered by Change Orders; and
- Providing support in preparation for potential mediation.

### 1.2.12 Tasks and Responsibilities - Financial/Cost Specialist – *Senior*

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

- Preparing a cost and cash flow estimate (e.g. identifying the resources, levels of effort and related costs) required for the project;
- Forecasting costs for specific activities such as: direct project costs, project support overhead, corporate or administrative overhead, costs of products and services, leasing costs;
- Assisting with cost control using problem solving techniques such as life-cycle analysis, value engineering, risk analysis or early estimation (elemental cost analysis);
- Analyzing trends in the real estate or construction markets and forecasting the impact of such trends on project costs;
- Monitoring actual or expected costs against previously budgeted costs and preparing variance analysis (e.g. analyzing and reporting on costs to complete projects and actions to be taken to stay on budget including the state of risk allowances, reserves or contingencies);
- Preparing discounted cash-flow analysis including sensitivity analysis;
- Preparing value-for-money calculations using Monte Carlo Simulation;
- Preparing historic or pro forma financial statement or ratio analysis (based on financial, employment, spatial or other data); and
- Providing a review of a financial analysis prepared by a different party.
- Evaluating financial management procedures;
- Reviewing submissions prepared by consultants or contractors relevant to financial activities;

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- Developing business plans or financial plans;
  - Providing input to update the Master (baseline) cost plan through:
    - Site inspections;
    - Assessing the project design and budgets;
    - Ensuring a common understanding of all contingencies or allowances; and
    - Comparing and reconciling previous project budgets with the current budget.
  - Providing approved budget, forecast, variances, actuals, billings, payments;
  - Assisting with cost planning including:
    - Participating in cost planning of project options and "what if" scenarios;
    - Providing advice on cost planning in order to coordinate ongoing project procurement activities with information within the organization's financial system;
    - Identifying and quantifying potential risks and making contingency recommendations in order to minimize negative cost impacts; and
    - Identifying, forecasting and analyzing project related risks focusing on the presentation, documentation and use of risk allowances or risk reserves or general contingencies.
  - Developing a detailed worksheet of sub-project annual funding, forecasts, value of work done over the life of the project;
  - Reviewing and monitoring overall project budget on a regular basis using information provided from the project team;
  - Highlighting variances and possible mitigation strategies to bring project costs back into budget;
  - Providing regular reports of project cash flow, including forecasted requirements on an as-required basis; and
  - Evaluating or applying governmental or industry (i.e. Generally Accepted Accounting Principles) methods in financial decision making as they relate to real property.

Further services include but not limited to:

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

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- Overseeing Change Order and amendment process, while ensuring all documentation is in order and processed by PSPC finance;
  - Monitoring forecast and ensuring that project forecasting goals are achieved;
  - Assisting PSPC with fiscal year end deliverables such as PAYE's; and
  - In collaboration with the PM, developing the program of work.

#### 1.2.13 Tasks and Responsibilities - Procurement Specialist – *Senior*

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

- Analysing and advising on best procurement delivery methods & tools for major projects;
- Providing tools, advice and guidance on complex procurement methodologies;
- Supporting project teams in their procurement initiatives and recommending alternative procurement methods when required, that ensure timely project delivery;
- Providing advice and overseeing the procurement and implementation phases of major project contracts;
- Writing and delivering Request for Proposals (RFPs) for major contracts in a fair, open and transparent manner;
- Participating in and overseeing selection processes; and
- Undertaking, with departments (where applicable), a post implementation review of the project contracts, identifying lessons learned, and making appropriate adjustments for future projects.

Further services include, but are not limited to, the following:

- Planning and coordinating procurement activities including financial estimates, business requirements and contracting options (project procurement management, cost and estimate management, sole sources versus RFP process);
- Providing briefings on progress and concerns of procurement (Contract process management);
- Planning, coordinating, preparing and controlling documentation for procurement plan and process, depending on method of procurement;
- Planning and coordinating the activities of project contractors and other support providers (Procurement integration in Project Management);
- Preparing, reviewing and/or finalizing Statement of Work for potential procurement;
- Preparing draft selection methodologies, evaluation plans, evaluation criteria (mandatory and point rated), and evaluation schedules for procurement;
- Developing, planning, analyzing, evaluating and prioritizing deliverables and requirements (Bid evaluation);
- Monitoring the implementation and operations of the Contract against established goals, objectives and milestones;
- Reporting progress of the Contract on an ongoing basis and at scheduled points in the life cycle;
- Identifying potential problems and proposing solutions;
- Ensuring management staff is provided with timely and accurate project information and status updates;
- Developing and implementing procurement control, monitoring of system contract delivery, and continuing service delivery and reporting procedures and managing changes;
- Conducting post procurement reviews and Contractor evaluations/lessons learned;
- Leading or participating in negotiations and developing procurement processes and business process maps;

- Developing a procurement strategy – for the acquisition of a product or service – that lays out a mechanism to engage with industry and conduct a competition and procurement in line with legislative requirements and organizational policies; and
- Producing evaluation reports and procurement recommendations for internal stakeholders and sign-off authorities.

#### 1.2.14 Tasks and Responsibilities - Quality Assurance/Management Specialist - *Senior*

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

- Developing, deploying and evaluating policies, procedures, standards, initiatives, metrics, forms and tools for the quality management system;
- Verifying and confirming if the quality management system's process assets (policies, procedures and standards) are being adhered to;
- Leading process improvement initiatives, and facilitating/coaching teams which are performing process improvement initiatives;
- Managing and monitoring all aspects of the Quality Management System;
- Conducting conformance audits of the Quality Management System: Reporting results and recommending appropriate corrective actions to deal with the non-conformances;
- Tracking and reporting on the implementation of corrective actions: Confirming that corrective actions effectively addressed the root-causes of the non-conformances;
- Contributing to the development and implementation of an integrated approach to quality, risk and performance management for the organization;
- Providing leadership and support to the design, implementation and evaluation of performance/quality measurements of clients products/services (program assessment/ranking and reporting, performance measurement of capacity building, business performance/excellence);
- Using multiple Quality Management methodologies and tools to address the organization's business needs (Measurement and management of organizational performance);
- Developing process management by application of continuous improvement methodology;
- Preparing reports concerning the capabilities, strengths and weaknesses of the Quality Management Systems for internal or external publication which could be communicated to project management team through oral or written presentations with the aptitude to influence all levels within the organization such as basic statistical analysis techniques, questionnaire design and survey analysis; and
- Liaising with and interviewing quality management specialists from other organizations.

#### 1.2.15 Tasks and Responsibilities - Risk Management Specialist – *Senior*

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

- Conducting risk assessments and evaluating potential risks and losses;
- Identifying project and procurement risks;
- Reviewing and auditing claims;
- Recommending alternative solutions, methodologies and strategies for risk mitigation and management;
- Assisting in prioritization and assignment of risks;
- Assisting in the development and/or implementation of Risk Management Plans;
- Developing and managing the implementation of Risk Management Plans (safety programs) to identify, analyze, plan, track, evaluate and control project risks on a continuous basis throughout the project life cycle;



- Coaching, mentoring and training project teams in risk mitigation techniques;
- Developing and implementing business continuity plans;
- Developing crisis and emergency communication and/or management planning strategies;
- Reviewing the organization's insurance and risk management programs and making recommendations regarding coverage improvements, administration, loss control and financing mechanisms;
- Providing leadership and support to the design, implementation and evaluation of clients products/services performance measures, risk management and risk mitigation strategies;
- Documenting process improvements;
- Preparing reports for internal and external publications (Corporate Services, Policy, Communications);
- Liaising with and interviewing stakeholders, as required, to obtain, clarify and exchange information, in order to coordinate and manage the Risk Assessment Process;
- Identifying, confirming and documenting the risk tolerance for the process, project, program, or strategic risk and using this tolerance to guide all analysis, assessment and recommendations undertaken or produced;
- Identifying, confirming and documenting the objectives and priorities specific to the process, project, program or strategic direction being assessed, and feasibility studies;
- Identifying relevant risks and opportunities (including, but not limited to, economic, political, operational, legal, reputation, technical, organizational, accounting, banking and social risk) that threaten the objectives and priorities;
- Utilizing both quantitative and qualitative techniques, as appropriate, to assess the likelihood that a risk event will occur, and the impact if the risk event occurs;
- Recommending a ranked-order for risks and opportunities identified;
- Recommending and documenting suggested Risk Responses necessary to manage the likelihood and impact of the identified risks;
- Performing Control Risk Assessments and analysis, which may include statistical sampling and analysis of existing controls;
- Assisting with the on-going monitoring of risk and assisting with the implementation of risk response/mitigation strategies;
- Preparing draft and finalized risk assessments, briefing notes, presentations and papers related to risk management, and developing and updating Risk Management Plans; and
- Providing advice with respect to risk management best practices and providing guidance and direction to assist in managing risk.

### **WORKSTREAM 3 - BUSINESS CONSULTING AND CHANGE MANAGEMENT**

#### **1.2.16 Tasks and Responsibilities - Business Consultant – *Senior***

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

- Specifying the organization's objectives, developing policies, standards and plans to achieve objectives;
- Advising *Senior* Management on a range of issues affecting the organization's ability to achieve the business objectives;
- Identifying opportunities for organizational improvement, as well as assisting in its prioritization and assignment
- Developing and/or managing the implementation of an organizational improvement plan to identify, analyze, plan, track and control organizational improvements on a continuous basis;

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- Making recommendations and providing advice for business improvement processes and programs, assisting in developing solutions, and implementing recommendations;
  - Collecting and analyzing information, presenting findings on complex issues, carrying out and/or coordinating research as required, and preparing reports;
  - Defining and producing business requirement document;
  - Providing coaching on business;
  - Assisting stakeholders with understanding their strategic goals;
  - Analyzing stakeholder's business objectives, and recommending, and developing solutions to address their business problem;
  - Implementing and evaluating cross-functional decisions that will enable an organization to achieve its objectives;
  - Assessing the organization's capacity/capability to undertake and successfully deliver an initiative or a change;
  - Identifying and evaluating critical success parameters, factors and performance measurements;
  - Analyzing, evaluating, developing business processes (financial, operational, systems, etc.);
  - Defining, developing and implementing business strategies, and plans;
  - Examining the link between the goals of the organization and how the work is performed to achieve those objectives at strategic and operational levels;
  - Processing problems into solutions or new opportunities or initiatives, identifying and researching best practices;
  - Performing Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis; and
  - Developing Mission and Vision statements.

#### 1.2.17 Tasks and Responsibilities - Change Management Consultant – *Senior*

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

- Designing interventions aimed at improving organizational effectiveness through a system-centered change;
- Designing interventions that improve organizational effectiveness through a people-centered change which must result in: bringing about change, an improved environment, greater involvement and a more responsive workforce;
- Developing and implementing change management strategies, plans, and frameworks;
- Identifying change management tools and risks;
- Providing expertise, consultative advice, guidance and coaching to build project capacity to make effective use of change management strategies and related tools;
- Articulating the purpose of change in a manner that makes sense to staff and provides a compelling picture of the new organization;
- Designing and conducting a change readiness assessment in order to plan and carry out a change management strategy;
- Coaching staff on the value of their contributions within the new organization;
- Evaluating the effectiveness of the change management initiative;
- Developing performance measurement/evaluation frameworks;
- Integrating performance monitoring disciplines in the organization's development or change management plan;
- Carrying out performance monitoring and reporting activities on change management;
- Analysing and developing business "critical success factors";
- Analysing and developing architecture requirements design, process development, process mapping and training;



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- Leading the functional workforce to define business strategies and processes in support of transformation and change management activities;
  - Participating in change impact analysis and change management activities;
  - Participating in organizational realignment (job redesign organizational restructuring);
  - Coordinating and collaborating with other stakeholders, in the development of training; and
  - Creating presentations and presenting them to various stakeholders as well as facilitating meetings and discussions.

#### 1.2.18 Tasks and Responsibilities - Communications Consultant – *Senior*

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

- Planning, researching, modifying, assisting, writing and/or reviewing memos, scripts, plays, essays, speeches, manuals and other non-journalistic articles with conformance to established standards;
- Developing and implementing strategic communication plans in geographically dispersed organizations going through an organizational transformation (change management);
- Providing communications consultation advice to support strategic communications initiatives and strategies;
- Creating communications support materials;
- Developing and implementing creative communication and information products using a variety of tools, techniques and media, and selecting an appropriate medium to convey information, ideas, and results;
- Developing and implementing communication strategies and plans;
- Expressing and exchanging information in a clear and concise manner;
- Ensuring information is communicated to the appropriate people in a timely manner;
- Preparing reports for specific purposes using clear, communicative, and professional language (*e.g. audit reports, management letters, consulting reports, financial reports*);
- Ensuring communications are clearly understood by encouraging and listening to feedback both internally and externally in the organization;
- Structuring external communications to project an appropriate corporate image;
- Ensuring confidentiality with respect to organizational or client information and data;
- Determining target audiences in order to better develop messages;
- Identifying and determining communications impediments and barriers;
- Providing advice on matters relating to policy/program development approaches or options and communications planning alternatives (internal and external);
- Researching, developing and implementing communications strategies involving social media and related content (i.e. blogs, microblogs, wikis, crowdsourcing, content communities, social networks, etc.);
- Providing support and assisting communicators in using social media channels to complement traditional channels; and
- Providing suggestions on cost-cutting measures in the communications process.

#### 1.2.19 Tasks and Responsibilities - Communications Consultant - *Intermediate*

The *Intermediate* Communications Consultant is to provide assistance to the *Senior* Communications Consultant in all of its activities but to a lesser extent, where judgment and experience to be applied to project situations do not require the level of analysis and interpretation of a Communications Consultant – *Senior*.

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The required services may include, but are not limited to, the tasks identified in section 1.2.18 Communications Consultant – *Senior*.

#### 1.2.20 Tasks and Responsibilities - Organizational Development Consultant – *Senior*

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

- Assessing the organization's capacity/capability to undertake and successfully deliver a project, an initiative or a change in the context of the existing organizational environment, programs, and policies;
- Advising *Senior* Management on a range of issues affecting the organization's ability to achieve a program or project's objectives;
- Providing advice, support and consultation to *senior* staff, business unit requests and front line management to achieve strategic initiatives and goals;
- Establishing a set of business rules and policies governing an organization's human resource management arrangements;
- Assessing existing and planned changes in HR management strategies to ensure consistency between an organization's HR management strategies and government-wide strategies;
- Designing processes to regularly review and revise existing accountabilities and competencies as the organization evolves;
- Performing system-centered process mapping to define the structure of organizational processes: including definition of activities to be performed, required inputs, outputs to be produced, and framework within which to operate;
- Researching, designing, implementing, and maintaining employee development programs including leadership development and other management development programs;
- Developing and implementing processes to measure the effectiveness of development and learning efforts to ensure performance improvements are focused on measurable and attainable results;
- Serving as an expert resource by collaborating with HR and business unit executives to ensure clear standards and metrics linked to talent reviews and employee development plans;
- Implementing and managing the organization's training to ensure cost effective employee development activities that support the organization's strategic initiatives;
- Defining potential organizational changes and processes and procedures improvements based on an organization's strategy and values;
- Developing and/or implementing organizational change and improvement plan including identifying organizational changes and improvements, and prioritization of recommended improvements;
- Developing strategic partnerships with other internal project managers to identify and consult on change management initiatives to support strategic projects requiring organizational culture change;
- Using the appropriate organizational development methodology and approach to evaluate and recommend solutions;
- Proactively addressing and responding to Organizational Development issues by bringing key stakeholders together to assess root causes and performance gaps and recommending appropriate interventions;
- Prototyping potential solutions, scenarios, providing trade off information and suggesting a recommended course of action on organizational improvements/changes;
- Providing advice on and/or assisting in implementing organizational changes and improvements;
- Managing and facilitating organizational initiatives and projects as requested;

- Developing coaching, mentoring, information sessions and training the organization to perform any of the above actions;
- Conducting reviews and developing implementation strategies; and
- Conducting organizational health assessment and development of strategy and its implementation.

#### **WORKSTREAM 4 - SPECIALIZED CONSULTING**

##### **1.2.21 Tasks and Responsibilities - Professional Architectural/Engineering Consultant – *Senior***

The required services encompass all electronic, electrical, optical, mechanical, structural, and materiel systems which may include, but are not limited to, the following:

- Preparing specifications for and carrying out the integration of systems and equipment;
- Conducting technical studies to produce technical options, validating and assessing options, assessing technical risks and evaluating designs;
- Developing design and prototype engineering solutions to technical problems;
- Maintaining and updating Unsatisfactory Condition Report (UCR) and Technical Failure Report (TFR) databases;
- Researching, evaluating, and responding to UCR/TFRs in conjunction with field support representatives;
- Producing draft specifications of systems, sub-systems, equipment, interfaces or ancillaries;
- Tailoring military or commercial standards, specifications or practices for incorporation into system specifications;
- Producing draft technical evaluation plans and evaluation standards;
- Generating and/or evaluating test plans, procedures and reports;
- Conducting specialized electromagnetic compatibility (EMC) studies, producing acceptable EMC standards and test procedures, and evaluating EMC / electromagnetic interference (EMI) test results;
- Designing programmable data acquisition, test sensors, and recorders used in conjunction with equipment testing;
- Developing simulation and analytical models, and utilizing the models for system and sub-system development and assessment;
- Preparing airworthiness certification management plans;
- Managing the planning, coordination, documentation, and engineering efforts connected with the airworthiness certification of modifications to air systems;
- Proposing and/or analyzing engineering change proposals, estimating costs/risks and making recommendations;
- Preparing budgetary estimates for the completion of technical programs;
- Preparing space and weight budgets for installations, assessing proposed designs, evaluating prototypes and developing acceptance tests for user hand over;
- Preparing drawings, data packages and systems manuals;
- Preparing interface standards and integration plans for the utilization of current and new systems/equipment;
- Reviewing and making recommendations on work proposals;
- Participating in planning meetings and technical reviews relating to the design, application management, and support of software sub-systems;
- Designing, testing and modifying hardware interfaces to digital computers, and confirming the correct functioning of hardware/software interfaces;

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- Preparing specifications and statements of work for the procurement of systems;
  - Developing quality assurance and configuration management plans and practices;
  - Conducting MA&S process and sub-process assessments and reengineering;
  - Tracking, correcting and recording system and equipment configuration status and/or conformance;
  - Preparing business cases, using a clear and effective cost/benefit analysis;
  - Developing and assessing maintenance strategies, plans and support requirements;
  - Providing equipment project management services;
  - Developing environmental protection standards, practices or policies;
  - Preparing, and reviewing instructions and procedures regarding the appropriate handling, clean-up, protective clothing and safety measures to deal with hazardous materials;
  - Developing or obtaining specifications such as material Safety Data Sheets for hazardous materials that are new to the project;
  - Conducting environmental or hazardous material assessments of equipment and systems;
  - Assessing the toxicological impact of materials and investigating alternate non-hazardous options;
  - Conducting system integration analyses on the organization and processes involved in the introduction of, and provision of, ongoing support to vehicle and/or communication systems;
  - Conducting a detailed derivation of integrated logistic system requirements for vehicle and communication systems within the vehicle, and planning for the ongoing support to those systems;
  - Planning the conduct of, providing technical guidance to and conducting statistical analysis of reliability, maintainability, availability and dependability (RAMD) tests of vehicle and communication systems within the vehicle;
  - Managing the planning, coordination, documentation and engineering efforts connected with the configuration management of vehicle and communication systems within the vehicle;
  - Designing, planning, implementing and modifying quality assurance programs within manufacturing, processing or distribution systems;
  - Providing human factors engineering (ergonomics) services (physical and cognitive);
  - Conducting the human factors engineering process such as planning, analysis, design, test and evaluation, and fundamentals and facilities of various environmental systems;
  - Conducting reviews of structural designs to ensure compliance with appropriate specifications, standards and guidelines;
  - Performing structural engineering analyses in the area of traditional stress analysis, preliminary design, finite element analysis, damage tolerance assessments ,loads derivation, structural dynamic response, and/or fracture mechanics analysis;
  - Preparing design documentation in support of structural engineering services, including draft stress reports, manufacturing drawings and/or design drawings; and
  - Signing-off (stamping) for final approval of technical documentation.

#### 1.2.22 Tasks and Responsibilities - Project Manager for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields – *Senior*

The *Senior* Project Manager for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements and Other Scientific Fields is to provide technical analyses and determination of requirements for the program of work of the client.

The required services may include, but are not limited to, the tasks identified in section 1.2.5 Project Manager for Real Property – *Senior*.

**1.2.23 Tasks and Responsibilities - Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields – *Senior***

The *Senior* Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements and Other Recognized Engineering Fields is to provide technical analyses and determination of requirements for the program of work of the client.

The required services may include, but are not limited to, the tasks identified in section 1.2.5 Project Manager for Real Property – *Senior*.

**1.2.24 Tasks and Responsibilities - Project Manager for Real Property with Technical Expertise in High-Level Security Requirements – *Senior***

The *Senior* Project Manager for Real Property with Technical Expertise in High-Level Security Requirements is to provide technical analyses and determination of requirements for the program of work of the client.

The required services may include, but are not limited to, the tasks identified in section 1.2.5 Project Manager for Real Property – *Senior*.

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

**2.1 Scope and Activities**

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

The Contractor must:

- Provide project management services for the preparation of updated functional and technical programs in cooperation with the A&E Team responsible for program definition;
- Review and confirm all components of the project plan(s), including scope, functional requirements, quality objectives, overall budget and schedule in cooperation with the A&E Team or contractor teams and PSPC;
- Review the preliminary implementation strategies proposed in all project plans, in cooperation with the A&E Team and PSPC;
- Develop an updated project management plan per project, noting project constraints, assumptions, inclusions and exclusions including all project implementation requirements and constraints of the Client / Users, PSPC, site, cost, time, risk, etc.;
- Prepare and communicate project policies and procedures with respect to the consultants, contractors and stakeholders;
- Prepare and communicate project policies and procedures in support of PSPC administrative requirements;
- Prepare a change management process that records changes to the scope of work. This must include changes deriving from Client /Users requests, site condition discoveries and other factors with due regard for financial authorities. The change management process must be organized and managed to be fully integrated with PSPC processes and be coordinated with the processes of the A&E Team and contractors. The process must be supported by a full description of roles and responsibilities, spreadsheet tracking templates and flow charts identifying the process;

- Prepare a master schedule, including the identification of timelines for design time, decision time and bid processes and milestones for input, decisions and approvals required by all project team members – PSPC, Client and other stakeholders;
- Advise on impacts to the project resulting from delayed decisions or approvals;
- Prepare a master cost plan by accounting for all projects;
- Prepare a preliminary Procurement Plan or update existing plans for all projects and establish a procurement strategy per project compatible with the requirements of PSPC. For common elements, establish a procurement strategy for the project;
- Provide logistical advice, analysis and support to develop the plan of occupant moves including options analysis;
- Develop and maintain the various PM systems and approaches for overall management and control of the project and each swing space project, such as:
  - A financial management system that is compatible with PSPC systems for reporting;
  - The definition and implementation of an approvals management system that will address, respond and report to the specific authorities having jurisdiction;
  - A system to ensure that all necessary permits, approvals, and licenses are in place;
  - Follow ups with regulatory bodies to review outstanding issues;
  - A change management system that includes a defined contractual process for initiation, review and approval of project changes;
  - Requirements report and a communications plan for the project team;
  - Protocols and security controls for electronic documents;
  - An electronic document information management system; and
  - A document access control system.
- Establish and maintain a Risk Management Plan per project;
- Organize, manage, participate in and document risk management sessions; and
- Provide technical writing support for activities such as the following: Treasury Board submissions, project briefing notes, progress status reports, project quality reports, monthly reports and quarterly reports.

## **2.2 Monthly Deliverables**

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

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

### **3.1 Scope and Activities**

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

#### **3.1.1 Design Review**

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



The PMSS Resources must:

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

### 3.1.2 Cost Management

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

The PMSS Resources must:

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

### 3.1.3 Risk Management

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

The PMSS Resources must:

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

### 3.1.4 Schedule Management

The Contractor must:

- Develop and control the project schedule, which incorporates all aspects of each project including design, approvals, tendering, construction, commissioning and handover; and
- Establish a schedule base timeline at the outset of each project:
  - Identify critical path, key milestones and key lead times for each project schedule;
  - Identify resource loading constraints; and
  - Monitor and report on project schedules identifying measures to shorten activity durations.

### 3.1.5 Procurement Support

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

The PMSS Resources must:

- Assist PSPC in selecting and retaining other consultants for professional services that may be required from time to time on projects. This includes:
  - The development of appropriate terms of reference associated with this activity;
  - The update of procurement plans for all project elements conforming to standards and guidelines as established by PSPC;
  - The review and development of tender evaluation summaries for recommendation to PSPC for contract award; and
  - In cooperation with PSPC procurement, the development of a methodology for pre-qualifying specific key Contractor and other identified pre-qualified components.
- Assist in the uniform preparation and tracking of Change Order dockets; and
- Coordinate IT components and systems requirements with the Client / Users and PSPC procurement specialists.

### 3.1.6 Scope Management

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

The PMSS Resources must:

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

### 3.1.7 Quality Management

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



The QA program must:

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

### **3.2 Monthly Deliverables**

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

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

### **4.1 Scope and Activities**

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

#### **4.1.1 Project Monitoring**

The PMSS Resources must monitor the project and ensure that the project objectives are being maintained throughout the execution of each sub-project phase. The PMSS Resources must also identify delays, risks, and work with the Project Team to identify opportunities to mitigate risks that arise.

#### **4.1.2 Reporting and Communications**

The PMSS Resources must:

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

#### 4.1.3 Scope Management

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

The PMSS Resources must:

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

#### 4.1.4 Quality Management

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

The PMSS Resources must:

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

#### 4.1.5 Cost Control

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

The PMSS Resources must:

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

#### 4.1.6 Schedule Control

The PMSS Resources must apply rigorous time control techniques to maintain and improve project schedules approved during the project implementation phase of each project.

The PMSS Resources will:

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

#### **4.2 Monthly Deliverables**

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

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

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

#### **5.1 Scope and Activities**

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

##### **5.1.1 Contractual items**

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

The PMSS Resources will ensure that all:

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

##### **5.1.2 Documentation**

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

The PMSS Resources must:

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

#### 5.1.3 Claims Management

The PMSS Resources must:

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

#### 5.1.4 Final Reports

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

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

### 5.2 Monthly Deliverables

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

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## ATTACHMENT 1 TO ANNEX A – EVALUATION REPORT PER RESOURCE

**AS PER ATTACHMENT 1 TO PART 4  
TABLE 1  
FLEXIBLE GRID – RESOURCES**

#	Category (Required or Optional)	Level	Language of Work	Name	Relevant Education	Professional Certification	Relevant Experience	Total Score	Minimum Points

In accordance with the flexible grid criteria scoring method for this specific category and level, the proposed resource is found to be:

☐ RESPONSIVE ☐ NON RESPONSIVE

**AS PER ATTACHMENT 2 TO PART 4  
TABLE 1  
MANDATORY TECHNICAL CRITERIA (MT)**

Mandatory Technical Criteria MT3

☐ MET

☐ NOT MET

As applicable:

### **WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES**

Mandatory Technical Criteria MT4

☐ MET

☐ NOT MET

Mandatory Technical Criteria MT5

☐ MET

☐ NOT MET

### **WORKSTREAM 2 - PROJECT FINANCE AND PERFORMANCE MANAGEMENT**

Mandatory Technical Criteria MT6

☐ MET

☐ NOT MET

Mandatory Technical Criteria MT7

☐ MET

☐ NOT MET

### **WORKSTREAM 3 - BUSINESS CONSULTING AND CHANGE MANAGEMENT**

Mandatory Technical Criteria MT8

☐ MET

☐ NOT MET

Mandatory Technical Criteria MT9

☐ MET

☐ NOT MET

### **WORKSTREAM 4 - SPECIALIZED CONSULTING**

Mandatory Technical Criteria MT10

☐ MET

☐ NOT MET

Mandatory Technical Criteria MT11

☐ MET

☐ NOT MET

Mandatory Technical Criteria MT12

☐ MET

☐ NOT MET

Mandatory Technical Criteria MT13

☐ MET

☐ NOT MET

In accordance with the Mandatory Technical grid criteria for this specific category and level, the proposed resource is found to be:

☐ RESPONSIVE ☐ NON RESPONSIVE

## THE CONTRACTOR'S PROPOSED RESOURCE IS:

☐ RESPONSIVE ☐ NON RESPONSIVE

## ANNEX B – BASIS OF PAYMENT

### A– Contract Period

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

#### 1.0 Professional Fees

Firm All-inclusive Hourly Rate (including profit, overhead expenses such as administrative support, facsimile, courier, photocopying, mail, word processing, office supplies, other operating costs and any time spent travelling from the specified individual's work location to a specific pre-authorized work assignment) in Canadian funds. Firm All-inclusive Hourly Rate will be used as the basis of payment for each call-up. The Contractor will be paid firm rates as follows, for work performed in accordance with the Contract. Applicable Taxes are extra.

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

ANNEX B TABLE 1 INITIAL CONTRACT PERIOD (YEAR 1 to 3)			
#	Resource Category	Level of Expertise	FIRM HOURLY RATE
<b>WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES</b>			
1	Portfolio Planner for Real Property	Senior	\$
2	Project Administrator for Real Property	Intermediate	\$
3	Project Leader for Real Property	Senior	\$
4	Project Leader / Executive for Real Property	Senior	\$
5	Project Manager for Real Property	Senior	\$
6	Project Manager for Real Property	Intermediate	\$
7	Project Manager for Real Property	Junior	\$
8	Project Planner for Real Property	Senior	\$
9	Project Scheduler for Real Property	Senior	\$
10	Technical Writer for Real Property	Senior	\$
<b>WORKSTREAM 2 - PROJECT FINANCE AND PERFORMANCE MANAGEMENT</b>			
11	Claims Analyst	Senior	\$
12	Financial/Cost Specialist	Senior	\$
13	Procurement Specialist	Senior	\$
14	Quality Assurance/Management Specialist	Senior	\$
15	Risk Management Specialist	Senior	\$

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WORKSTREAM 3 - BUSINESS CONSULTING AND CHANGE MANAGEMENT			
16	Business Consultant	Senior	\$
17	Change Management Consultant	Senior	\$
18	Communications Consultant	Senior	\$
19	Communications Consultant	Intermediate	\$
20	Organizational Development Consultant	Senior	\$
WORKSTREAM 4 - SPECIALIZED CONSULTING			
21	Professional Architectural/Engineering Consultant	Senior	\$
22	Project Manager for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields	Senior	\$
23	Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields	Senior	\$
24	Project Manager for Real Property with Technical Expertise in High-Level Security Requirements	Senior	\$

#### \* **ESCALATION CLAUSE**

The firm hourly rates detailed in the Pricing Schedule above, will be adjusted annually on the start date of each new Contract Year (starting with Contract Year 2 and for the whole period of the contract including the option periods) by the amount established based on the annual average percentage increase (decrease) in the monthly index of the Consumer Price Index (CPI) for Canada, All-Items (Not Seasonally Adjusted), published in Statistics Canada Catalogue no.62-001-X, Table 5, for the 12-month period ending 2 months prior to the new Contract Year Start date.  
<https://www150.statcan.gc.ca/n1/daily-quotidien/200819/cg-b001-eng.htm>

Example:

Contract Start Date: March 1, 2018

At the start of Contract Year 2 (i.e. March 1, 2019), the Contract Year 1 rates as stated in Table 1 Pricing Schedule would be increased by 1.11% based on the following assumptions:

		% Change in Monthly CPI
January	2018	1.1%
February	2018	1.6%
March	2018	1.3%
April	2018	1.3%
May	2018	1.1%
June	2018	1.1%
July	2018	1.5%
August	2018	0.9%
September	2018	0.6%
October	2018	1.3%
November	2018	0.6%
December	2018	0.9%

13.3% / 12 months = 1.11%

---

To determine the Contract Year 3 rates, the Contract Year 2 rates calculated above would be adjusted using the same Statistics Canada Table and same formula with data for the January 2019 – December 2020 12-month period.

## **2.0 Cost Reimbursable Expenses**

### **2.1 Travel and Living Expenses – National Joint Council Travel Directive**

No travel related expenses or living expenses will be provided for travel to or from PSPC offices or sites within the NCA.

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work done, delivered or performed outside the National Capital Region (NCR) defined in the [National Capital Act \(R.S.C., 1985, c. N-4\)](https://laws-lois.justice.gc.ca/eng/acts/N-4/), available on the Justice Website (<https://laws-lois.justice.gc.ca/eng/acts/N-4/>), at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, and private vehicle allowances specified in Appendices B, C and D of the [National Joint Council Travel Directive](https://www.njc-cnm.gc.ca/directive/d10/en) (<https://www.njc-cnm.gc.ca/directive/d10/en>), and with the other provisions of the directive referring to "travelers", rather than those referring to "employees". Canada will not pay the Contractor any incidental expense allowance for authorized travel.

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

All payments are subject to government audit.

Estimated Travel Cost on this contract: **TBD at contract award.**

## **B– Option to Extend the Term of the Contract**

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

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

### **B–1 Extended Contract Period**

#### **1.0 Professional Fees**

Firm All-inclusive Hourly Rate (including profit, overhead expenses such as administrative support, facsimile, courier, photocopying, mail, word processing, office supplies, other operating costs and any time spent travelling from the specified individual's work location to a specific pre-authorized work assignment) in Canadian funds. Firm All-inclusive Hourly Rate will be used as the basis of payment for each call-up. The Contractor will be paid firm rates as follows, for work performed in accordance with the Contract. Applicable Taxes are extra.

The Contractor will be paid all-inclusive fixed time rates as follows, based on Year 3 rates:

Note: The following table will be filled out if Option Year 1, Year 4 is exercised.



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**ANNEX B  
TABLE 2  
EXTENDED CONTRACT PERIOD (YEAR 4)**

#	Resource Category	Level of Expertise	FIRM HOURLY RATE
<b>WORKSTREAM 1 - REAL PROPERTY PROJECT MANAGEMENT SERVICES</b>			
1	Portfolio Planner for Real Property	Senior	\$
2	Project Administrator for Real Property	Intermediate	\$
3	Project Leader for Real Property	Senior	\$
4	Project Leader / Executive for Real Property	Senior	\$
5	Project Manager for Real Property	Senior	\$
6	Project Manager for Real Property	Intermediate	\$
7	Project Manager for Real Property	Junior	\$
8	Project Planner for Real Property	Senior	\$
9	Project Scheduler for Real Property	Senior	\$
10	Technical Writer for Real Property	Senior	\$
<b>WORKSTREAM 2 - PROJECT FINANCE AND PERFORMANCE MANAGEMENT</b>			
11	Claims Analyst	Senior	\$
12	Financial/Cost Specialist	Senior	\$
13	Procurement Specialist	Senior	\$
14	Quality Assurance/Management Specialist	Senior	\$
15	Risk Management Specialist	Senior	\$
<b>WORKSTREAM 3 - BUSINESS CONSULTING AND CHANGE MANAGEMENT</b>			
16	Business Consultant	Senior	\$
17	Change Management Consultant	Senior	\$
18	Communications Consultant	Senior	\$
19	Communications Consultant	Intermediate	\$
20	Organizational Development Consultant	Senior	\$
<b>WORKSTREAM 4 - SPECIALIZED CONSULTING</b>			
21	Professional Architectural/Engineering Consultant	Senior	\$
22	Project Manager for Real Property with Scientific Expertise in Environmental, Chemical, Biological Requirements, and Other Scientific Fields	Senior	\$
23	Project Manager for Real Property with Technical Expertise in Geotechnical, Structural, Electrical, Seismic Requirements, and Other Recognized Engineering Fields	Senior	\$
24	Project Manager for Real Property with Technical Expertise in High-Level Security Requirements	Senior	\$

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## **2.0 Cost Reimbursable Expenses**

### **2.1 Travel and Living Expenses – National Joint Council Travel Directive**

No travel related expenses or living expenses will be provided for travel to or from PSPC offices or sites within the NCA.

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work done, delivered or performed outside the National Capital Region (NCR) defined in the [National Capital Act \(R.S.C., 1985, c. N-4\)](https://laws-lois.justice.gc.ca/eng/acts/N-4/), available on the Justice Website (<https://laws-lois.justice.gc.ca/eng/acts/N-4/>), at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, and private vehicle allowances specified in Appendices B, C and D of the [National Joint Council Travel Directive](https://www.njc-cnm.gc.ca/directive/d10/en) (<https://www.njc-cnm.gc.ca/directive/d10/en>), and with the other provisions of the directive referring to "travelers", rather than those referring to "employees". Canada will not pay the Contractor any incidental expense allowance for authorized travel.

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

All payments are subject to government audit.

Estimated Travel Cost on this contract: \$TBD at contract award.

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## ANNEX C – SECURITY REQUIREMENTS CHECK LIST

(See attached hereto)



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

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

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

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

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

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

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

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

Special comments: 10a: 1. The supplier will require to have a secret clearance; and  
Commentaires spéciaux : 2. The proposed resources will require reliability or secret - in accordance with the client's  
requirement identified on each Task Authorization issued.

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

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

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

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

**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

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

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

**PRODUCTION**

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

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

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

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

TBS/SCT 350-103(2004/12)

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**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 TRÈS SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET TRÈS SECRET
											A	B	C			
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 ☐ Yes  
Non Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

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

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

☒ No ☐ Yes  
Non Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

## ATTACHMENT 1 TO ANNEX C – SECURITY CLASSIFICATION GUIDE

<b>National Capital Area Project Delivery (NCAPD)</b> <b>SECURITY CLASSIFICATION GUIDE</b> <b>for</b> <b>NCAPD Project Management Support Services (PMSS) Contracts: EN439-20211126</b>	
<b>APPLICABILITY</b>	<b>SECURITY LEVEL</b>
1. The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of SECRET, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).	Contractor (i.e. supplier): <b>Secret (Level II)</b>
2. All the Contractor's proposed resources must have and maintain a minimum security clearance of Reliability throughout the Contract.	Personnel (i.e. resource): <b>Reliability</b>
3. The Contractor's proposed resources requiring access to CLASSIFIED information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of SECRET (Level II), granted or approved by CISD/PWGSC throughout the Contract.	Personnel (i.e. resource): <b>Secret (Level II)</b>
4. The Contractor MUST NOT remove any CLASSIFIED information or assets from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.	
5. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.	
6. The Contractor must comply with the provisions of the: a. Security Requirements Check List (SRCL) and security guide attached at <b>Annex C</b> ; and b. Industrial Security Manual (Latest Edition).	

All other terms and conditions remain unchanged.

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## **ANNEX D – INSURANCE REQUIREMENTS**

### **COMMERCIAL GENERAL LIABILITY INSURANCE**

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000.00 per accident or occurrence and in the annual aggregate.
2. The Commercial General Liability policy must include the following:
  - a. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada will read as follows: Canada, as represented by Public Works and Government Services Canada.
  - b. Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
  - c. Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
  - d. Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
  - e. Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
  - f. Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
  - g. Employees and, if applicable, Volunteers must be included as Additional Insured.
  - h. Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program).
  - i. Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
  - j. Notice of Cancellation: The Contractor will provide the Contracting Authority thirty (30) days prior written notice of policy cancellation or any changes to the insurance policy.
  - k. If the policy is written on a claims-made basis, coverage must be in place for a period of at least twelve (12) months after the completion or termination of the Contract.
  - l. Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
  - m. Non-Owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.
  - n. Advertising Injury: While not limited to, the endorsement must include coverage piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

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- o. All Risks Tenants Legal Liability - to protect the Contractor for liabilities arising out of its occupancy of leased premises.
  - p. Amendment to the Watercraft Exclusion to extend to incidental repair operations on board watercraft.
  - q. Sudden and Accidental Pollution Liability (minimum 120 hours): To protect the Contractor for liabilities arising from damages caused by accidental pollution incidents.
  - r. Litigation Rights: Pursuant to subsection 5(d) of the [Department of Justice Act](#), S.C. 1993, c. J-2, s.1, if a suit is instituted for or against Canada which the Insurer would, but for this clause, have the right to pursue or defend on behalf of Canada as an Additional Named Insured under the insurance policy, the Insurer must promptly contact the Attorney General of Canada to agree on the legal strategies by sending a letter, by registered mail or by courier, with an acknowledgement of receipt.

**For the province of Quebec, send to:**

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

**For other provinces and territories, send to:**

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

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

**ERRORS AND OMISSIONS LIABILITY INSURANCE**

- 1. The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000.00 per loss and in the annual aggregate, inclusive of defence costs.
- 2. If the policy is written on a claims-made basis, coverage must be in place for a period of at least twelve (12) months after the completion or termination of the Contract.
- 3. The following endorsement must be included:
  - Notice of Cancellation: The Contractor will provide the Contracting Authority thirty (30) days prior written notice of policy cancellation or any changes to the insurance policy.



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## ANNEX E – TASK AUTHORIZATION FORM

<b>Contract Number</b>	EN439-211126/XXX/XX
<b>Task Authorization (TA) Number</b>	Instructions to the TA Authority: Enter the number here <b>XX</b>
<b>Contractor's Name and Address</b>	
<b>Total Estimated Cost of Task</b> (Applicable Taxes extra) <b>before any revisions:</b>	\$_____ Instructions to the TA Authority: Enter the amount here.
<b>TA Revisions Previously Authorized</b>	
Instructions to the TA Authority: the information for the previously authorized revisions must be presented in ascending order of assigned revision numbers (the first revision must be identified as No. 1, the second as No. 2, etc.). If no increase or decrease was authorized, enter \$0.00 or N/A. Add rows, as needed	
<b>TA Revision Number:</b> _____ ( ) Instructions to the TA Authority: Enter the number here, as applicable and the reason for the revision in parentheses.	<b>Authorized Increase or Decrease</b> (Applicable Taxes extra) \$_____ Instructions to the TA Authority: Enter the amount here, as applicable.
<b>TA Revision Number:</b> _____ ( ) Instructions to the TA Authority: Enter the number here, as applicable and the reason for the revision in parentheses.	<b>Authorized Increase or Decrease</b> (Applicable Taxes extra) \$_____ Instructions to the TA Authority: Enter the amount here, as applicable.
<b>TA Revision Number:</b> _____ ( ) Instructions to the TA Authority: Enter the number here, as applicable and the reason for the revision in parentheses.	<b>Authorized Increase or Decrease</b> (Applicable Taxes extra) \$_____ Instructions to the TA Authority: Enter the amount here, as applicable.
<b>TA Revision Number:</b> _____ ( ) Instructions to the TA Authority: Enter the number here, as applicable and the reason for the revision in parentheses.	<b>Authorized Increase or Decrease</b> (Applicable Taxes extra) \$_____ Instructions to the TA Authority: Enter the amount here, as applicable.
<b>New TA Revision</b>	
Instructions to the TA Authority: the first revision must be identified as No. 1, the second as No. 2, etc. If no increase or decrease is authorized, enter \$0.00 or N/A.	
<b>TA Revision Number:</b> _____ ( ) Instructions to the TA Authority: Enter the number here, as applicable and the reason for the revision in parentheses.	<b>Authorized Increase or Decrease</b> (Applicable Taxes extra) \$_____ Instructions to the TA Authority: Enter the amount here, as applicable.
<b>Total Estimated Cost of Task</b> (Applicable Taxes extra) <b>after this revision:</b>	\$_____ Instructions to the TA Authority: Enter the amount here, as applicable.
<b>Contract Security Requirements (as applicable)</b>	
This task includes security requirements: FSC SECRET at the level of SECRET for Organization and RELIABILITY or SECRET as required for its personnel.	
Refer to the Security Requirements Checklist (SRCL) and classification guide, <b>ANNEX C</b> of the Contract.	
<b>Resource Requirement:</b> Check the applicable box. <input type="checkbox"/> <b>RELIABILITY</b> or <input type="checkbox"/> <b>SECRET</b>	

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#### Language Requirements (as applicable)

This task includes language requirements: Canada performs work in both official languages – French and English. While proposed resources must be fluent in English, there will be a requirement for specific resources to be fluent in French and English. Fluent means that the individual must be able to communicate orally and in writing without any assistance and with minimal errors.

**Resource Requirement:** Check applicable box.

- ☒ **ENGLISH**  
☐ **FRENCH**

#### Required Work

Instructions to the TA Authority: The content of sections A, B, C and D must be in accordance with the Contract.

#### SECTION A – Task Description of the Work Required

Instructions to the TA Authority: The content of section A must identify the project, provide a brief description of it, list the tasks/deliverables and identify if PSPC will provide the resource with a workstation and a Notebook.

One (1) **Select a Level and Category Here** required for the **Enter the name of the project here.**

**Select Work Location Here**  
**Select Equipment Loan Here**

#### SECTION B – Applicable Basis of Payment

Instructions to the TA Authority: The content of section B must be in accordance with **Annex B** of the contract.

**Select a Level and Category Here**

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## SECTION C – Cost Breakdown of Task

Instructions to the TA Authority: The content of section C must be in accordance with **Annex B** of the contract.

Estimated Period of Services:

Level & Category as Stated in SECTION A & B	Name of the resource	RATE	Total Estimated Level of Effort Hours	Total Estimated Cost
		\$		\$

Total Estimated Cost of Professional Fees to a Limitation of Expenditure: \$ (Applicable taxes extra).

## SECTION D – Applicable Method of Payment

Instructions to the TA Authority: The content of section D must be in accordance with Section 7 of the contract.: 7 Methods of Payment – Authorized TA

Source of funding: \_\_\_\_\_ Enter Project Number or Financial Coding

Refer to PART 7, Clause 7. Methods of Payment – Authorized TA.

### Authorization – Authorization

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

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

Name of Project Authority – Nom du chargé de projet

Signature \_\_\_\_\_

Date \_\_\_\_\_

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

Signature \_\_\_\_\_

Date \_\_\_\_\_

### Contractor's Signature – Signature de l'entrepreneur

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

Signature \_\_\_\_\_

Date \_\_\_\_\_

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## ANNEX F – TEMPLATE FOR REPORTING ON THE RESULTS OF THE INDIGENOUS PARTICIPATION PLAN (IPP)

### Report on Participation of Indigenous Peoples, Indigenous Firms and Indigenous Communities in the Performance of the Contract.

Contractor's name: \_\_\_\_\_  
Contractor's PBN: \_\_\_\_\_  
Contract #: \_\_\_\_\_

Reporting Period: From \_\_\_\_\_ TO \_\_\_\_\_  
(MM-DD-YYYY) (MM-DD-YYYY)

Report prepared on: \_\_\_\_\_  
(MM-DD-YYYY)

This report supersedes any previous report relating to this reporting period.

#### A) Indigenous Project Resources Employed by the Contractor

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

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

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

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

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

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

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

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

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