

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

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

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

## Request For a Standing Offer Demande d'offre à commandes

### Departmental Individual Standing Offer (DISO)

Offre à commandes individuelle du département(OCID

Canada, as represented by the Minister of Public Works and Government Services Canada, hereby requests a Standing Offer on behalf of the Identified Users herein.

Le Canada, représenté par le ministre des Travaux Publics et Services Gouvernementaux Canada, autorise par la présente, une offre à commandes au nom des utilisateurs identifiés énumérés ci-après.

## Comments - Commentaires

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

**Issuing Office - Bureau de distribution**

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

<b>Title - Sujet</b> Interior Design SO	
<b>Solicitation No. - N° de l'invitation</b> EP929-201835/A	<b>Date</b> 2021-06-15
<b>Client Reference No. - N° de référence du client</b> 20201835	<b>GETS Ref. No. - N° de réf. de SEAG</b> PW-\$\$FE-170-80121
<b>File No. - N° de dossier</b> fe170.EP929-201835	<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 Daylight Saving Time EDT <b>on - le 2021-07-27</b> Heure Avancée de l'Est HAE	
<b>Delivery Required - Livraison exigée</b> See Herein – Voir ci-inclus	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Lanthier(fe170), Marc	<b>Buyer Id - Id de l'acheteur</b> fe170
<b>Telephone No. - N° de téléphone</b> (613)296-6110 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> National Capital Area	
<b>Security - Sécurité</b> This request for a Standing Offer does not include provisions for security. Cette Demande d'offre à commandes ne comprend pas des dispositions en matière de sécurité.	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

**IMPORTANT NOTICE:**

Offerors must use the epost Connect service provided by Canada Post Corporation to transmit their offer electronically. Offerors must refer to GI 10, Submission of Proposal, and SRE 2, Proposal Requirements, for further information. Due to the nature of the solicitation, transmission of offers by facsimile is not recommended for administrative reasons but offered to provide an alternative opportunity in case of incompatibility or inability to transmit by epost Connect service.

**Hard copy (submitted in person or via mail/courier) offers will not be accepted as part of this Request for Standing Offer.**

**REQUEST FOR STANDING OFFERS (RFSO)****TABLE OF CONTENTS****GENERAL INSTRUCTIONS TO PROPONENTS (GI)****SUPPLEMENTARY INSTRUCTIONS TO PROPONENTS (SI)****STANDING OFFER PARTICULARS (SOP)****TERMS AND CONDITIONS****General Conditions (GC)****Supplementary Conditions (SC)****Terms of Payment (TP)****Consultant Services (CS)****Calculation of Fees (CF)**

Standing Offer Brief - Required Services (RS)

Submission Requirements and Evaluation (SRE)

Appendix A - Declaration/Certifications Form

Appendix B - Price Proposal Form

Appendix C - Team Identification

Appendix D - Doing Business with PWGSC Documentation and Deliverables Manual

## **GENERAL INSTRUCTIONS TO PROPONENTS (GI)**

- GI 1 Integrity Provisions - Proposal**
- GI 2 Definitions**
- GI 3 Introduction**
- GI 4 Procurement Business Number**
- GI 5 Quantity**
- GI 6 PWGSC Obligation**
- GI 7 Responsive Proposals**
- GI 8 Communications - Solicitation Period**
- GI 9 Overview of Selection Process**
- GI 10 Submission of Proposal**
- GI 11 Not Applicable**
- GI 12 Evaluation of Price**
- GI 13 Limitation of Submissions**
- GI 14 Licensing Requirements**
- GI 15 Rejection of Proposal**
- GI 16 Insurance Requirements**
- GI 17 Joint-Venture**
- GI 18 Late Submissions**
- GI 19 Legal Capacity**
- GI 20 Debriefing**
- GI 21 Financial Capability**
- GI 22 Revision of Proposal**
- GI 23 Performance Evaluation**
- GI 24 Proposal Costs**
- GI 25 Conflict of Interest - Unfair Advantage**
- GI 26 Limitation of Liability**
- GI 27 Status and Availability of Resources**
- GI 28 Code of Conduct for Procurement - Proposal**
- GI 29 Bid Challenge and Recourse Mechanisms**

## GI 1 Integrity Provisions - Proposal

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

6. Canada will declare non-responsive any bid in respect of which the information requested is incomplete or inaccurate, or in respect of which the information contained in a certification or declaration is found by Canada to be false or misleading in any respect. If Canada establishes after issuance of the Standing Offer that the Proponent provided a false or misleading certification or declaration, Canada may set aside the Standing Offer and terminate for default any resulting contracts. Pursuant to the Policy, Canada may also determine the Proponent to be ineligible for issuance of a standing offer for providing a false or misleading certification or declaration.

## **GI 2 Definitions**

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

**"Applicable Taxes":**

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

**"Consultant Team":**

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

**"Key Personnel":**

Staff of the Proponent, sub-consultants and specialists proposed to be assigned to this project.

**"Price Rating":**

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

**"Proponent":**

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

**"PWGSC Evaluation Board":**

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

**"Substantial Performance"**

The construction work shall be considered to have reached Substantial Performance when;

- a) the construction work or a substantial part thereof has passed inspection and testing and is, in the opinion of the owner, ready for use by the owner or is being used for the intended purposes and
- b) the construction work is, in the opinion of the owner, capable of completion or correction at a cost of not more than
  - i. 3 percent of the first \$500,000;
  - ii. 2 percent of the next \$500,000; and
  - iii. 1 percent of the balance

of the contract amount at the time this cost is calculated.

"Technical Rating":

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

### **GI 3 Introduction**

1. Public Works and Government Services Canada (PWGSC) is inviting consulting firms with Full Service Interior Design expertise to submit proposals for Standing Offers. The selected consultants shall provide a range of services as identified in the Required Services section of this document for projects in the National Capital Region (NCR).
2. Proponents shall be licensed or eligible to be licensed to practice in the province of Quebec and Ontario. If a Proponent is licensed to practice in only one of the two provinces, then that Proponent must be eligible and willing to be licensed in the province in which they are not licensed. In general, the firm and its personnel will be evaluated on the basis of their demonstrated understanding of the scope of services, their approach and methodology to providing those services, the quality of their relevant experience in this area, as well as the cost of the provision of the services.

It is PWGSC's intention to authorize up to five Standing Offers.

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

The Consultant grants to Canada the irrevocable option to extend the term of the Standing Offer by up to two additional one year periods under the same conditions and at the rates specified in the Standing Offer. The decision to exercise the option(s) to extend the term is at the sole discretion of Canada.

In the event that Canada decides to exercise an option to extend the Standing Offer period, Canada will notify the Consultant of the decision before the expiry date of the Standing Offer or the previously extended period as the case may be. An amendment to the Standing Offer will be issued by the Contracting Authority to document the extended period.

The total dollar value of all Standing Offers is estimated to be \$10,000,000.00 (Applicable Taxes included). Individual call-ups will vary, up to a maximum of \$2,000,000.00 (Applicable Taxes included). Proponents should note that there is no guarantee that the full or any amount of the Standing Offer will be called-up; PWGSC will issue call-ups only when the specific services to be provided under the Standing Offer are needed. Please refer to Section **SOP 5, Call-up Procedure**.

3. This procurement is subject to the provisions of the World Trade Organization - Agreement on Government Procurement (WTO-AGP), Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).
4. This solicitation requires Proponents to use the epost Connect service provided by Canada Post Corporation to transmit their proposals electronically.

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

Proponents must refer to GI 10 Submission of Proposal and SRE 2 Proposal Requirements of the solicitation document for further information.

**Hard copy (submitted in person or via mail/courier) offers will not be accepted as part of this Request for Standing Offer.**

#### **GI 4 Procurement Business Number**

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

#### **GI 5 Quantity**

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

#### **GI 6 PWGSC Obligation**

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

#### **GI 7 Responsive Proposals**

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

#### **GI 8 Communications – Solicitation Period**

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

#### **GI 9 Overview of Selection Process**

The Standing Offer selection process is as follows:

- (a) Request for Standing Offers is obtained by proponents through the GETS;
- (b) in response to the Request for Standing Offers, interested proponents should submit the technical component of their proposal in one section and the proposed price of the services (price proposal) in a second section;

- (c) responsive proposals are reviewed, evaluated and rated by a PWGSC Evaluation Board in accordance with the criteria, components and weight factors set out in the Request for Standing Offers;
- (d) PWGSC may issue a standing offer to the successful proponents;
- (e) Proponents are notified of the results within one week after PWGSC has entered into a standing offer arrangement with the successful proponents.

## **GI 10 Submission of Proposal**

### **GI 10.1 Submission of Proposal**

1. Canada requires that each proposal, at closing date and time or upon request from the Contracting Authority, be signed by the Proponent or by an authorized representative of the Proponent. If a proposal is submitted by a joint venture, it must be in accordance with section GI 17.
2. It is the Proponent's responsibility to:
  - (a) obtain clarification of the requirements contained in the Request for Standing Offers, if necessary, before submitting a proposal;
  - (b) submit a proposal duly completed, in the requested format, on or before the closing date and time set for receipt of proposals;
  - (c) send its proposal only to Public Works and Government Services Canada (PWGSC):
    - (i) Submission by epost Connect, see instructions in GI 10.2.1 below.
    - (ii) In the case of submission by Facsimile, see instructions in GI 10.2.2 below.
  - (d) ensure that the Proponent's name, the solicitation number and description, and solicitation closing date and time are clearly identified; and
  - (e) provide a comprehensive and sufficiently detailed proposal that will permit a complete evaluation in accordance with the criteria set out in the Request for Standing Offers.
3. Hard copy (submitted in person or via mail/courier) proposals will not be accepted as part of this Request for Standing Offers.
4. The technical and price components of the proposal should be submitted in separate sections in accordance with the instructions contained in the solicitation document.
5. Timely and correct delivery of proposals to the office designated for receipt of proposals is the sole responsibility of the Proponent. Public Works and Government Services Canada will not assume or have transferred to it those responsibilities. All risks and consequences of incorrect delivery of proposals are the responsibility of the Proponent.
6. The evaluation of proposals may result in authorization to utilize one or more Standing Offers in whole or in part, taking into consideration the evaluation criteria and selection method stated herein. The lowest priced proposal or any proposal will not necessarily be authorized. In case of error in the calculation of prices, the unit prices will govern.
7. The proposal should completely and thoroughly address each element of the requirements as enumerated in the Request for Standing Offers. It is also essential that the elements contained in the proposal be stated in a clear and concise manner.



8. Proposal documents and supporting information may be submitted in either English or French.
9. Canada will make available Notices of Proposed Procurement (NPP), RFSO and related documents for download through the Government Electronic Tendering Service (GETS). Canada is not responsible and will not assume any liabilities whatsoever for the information found on websites of third parties. In the event an NPP, RFSO or related documentation would be amended, Canada will not be sending notifications. Canada will post all amendments using GETS. It is the sole responsibility of the Proponent to regularly consult GETS for the most up-to-date information. Canada will not be liable for any oversight on the Proponent's part nor for notification services offered by a third party.

## **GI 10.2 Transmission by epost Connect or Facsimile**

### **1. epost Connect**

- (a) Proposals must be submitted by using the epost Connect service provided by Canada Post Corporation  
([https://www.canadapost.ca/web/en/products/details.page?article=epost\\_connect\\_send\\_a](https://www.canadapost.ca/web/en/products/details.page?article=epost_connect_send_a)).

The only acceptable email address to use with epost Connect for responses to this bid solicitation is: [tpsgc.dgareceptiondessoumissions-abbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca](mailto:tpsgc.dgareceptiondessoumissions-abbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca).

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

- (b) To submit a proposal using epost Connect service, the Proponent must either:
  - (i) send directly its proposal only to the specified PWGSC Bid Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or
  - (ii) send as early as possible, and in any case, at least six (6) business days prior to the solicitation closing date and time (in order to ensure a response), an email that includes the solicitation number to the specified PWGSC Bid Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.
- (c) If the Proponent sends an email requesting epost Connect service to the specified Bid Receiving Unit in the solicitation, an officer of the Bid Receiving Unit will then initiate an epost Connect conversation. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Proponent to access and action the message within the epost Connect conversation. The Proponent will then be able to transmit its proposal afterward at any time prior to the proposal closing date and time.
- (d) If the Proponent is using its own licensing agreement to send its proposal, the Proponent must keep the epost Connect conversation open until at least 30 business days after the solicitation closing date and time.
- (e) The Request for Standing Offers number should be identified in the epost Connect message field of all electronic transfers.

- (f) It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a Proponent not have a Canadian address, they may use the Bid Receiving Unit address specified in the solicitation in order to register for the epost Connect service.
- (g) For proposals transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the proposal including, but not limited to, the following:
  - (i) receipt of a garbled, corrupted or incomplete proposal;
  - (ii) availability or condition of the epost Connect service;
  - (iii) incompatibility between the sending and receiving equipment;
  - (iv) delay in transmission or receipt of the proposal;
  - (v) failure of the Proponent to properly identify the proposal;
  - (vi) illegibility of the proposal;
  - (vii) security of proposal data; or
  - (viii) inability to create an electronic conversation through the epost Connect service.
- (h) The Bid Receiving Unit will send an acknowledgement of the receipt of proposal document(s) via the epost Connect conversation, regardless of whether the conversation was initiated by the supplier using its own license or the Bid Receiving Unit. This acknowledgement will confirm only the receipt of proposal document(s) and will not confirm if the attachments may be opened nor if the content is readable.
- (i) Proponents must ensure that they are using the correct email address for the Bid Receiving Unit when initiating a conversation in epost Connect or communicating with the Bid Receiving Unit and should not rely on the accuracy of copying and pasting the email address into the epost Connect system.
- (j) A proposal transmitted by epost Connect service constitutes the formal proposal of the Proponent and must be submitted in accordance with section GI 10.1.

## **2. Facsimile**

- (a) Proposals may be submitted by facsimile. The only acceptable facsimile number for responses to this Request for Standing Offers issued by PWGSC headquarters is:  
  
Bid Fax: (819) 997-9776
- (b) For proposals transmitted by facsimile, Canada will not be responsible for any failure attributable to the transmission or receipt of the faxed proposal including, but not limited to, the following:
  - (i) receipt of garbled, corrupted or incomplete proposal;
  - (ii) availability or condition of the receiving facsimile equipment;
  - (iii) incompatibility between the sending and receiving equipment;
  - (iv) delay in transmission or receipt of the proposal;
  - (v) failure of the Proponent to properly identify the proposal;
  - (vi) illegibility of the proposal; or
  - (vii) security of proposal data.
- (c) A proposal transmitted by facsimile constitutes the formal proposal of the Proponent and must be submitted in accordance with section GI 10.1.

## **GI 11 Not Applicable**

## **GI 12 Evaluation of Price**

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

#### **GI 13 Limitation of Submissions**

1. A Proponent may not submit more than one proposal. This limitation also applies to the persons or entities in the case of a joint venture. If more than one proposal is received from a Proponent (or, in the case of a joint venture, from the persons or entities), all such proposals shall be rejected and no further consideration shall be given.
2. A joint venture as defined in GI 17.
3. An arrangement whereby Canada contracts directly with a consultant who may retain sub-consultants or specialist consultants to perform portions of the services is not a joint venture arrangement. A sub-consultant or specialist consultant may, therefore, be proposed as part of the Consultant Team by more than one Proponent. The Proponent warrants that it has written permission from such sub-consultant or specialist consultant to propose their services in relation to the services to be performed.
4. Notwithstanding paragraph 3. above, in order to avoid any conflict of interest, or any perception of conflict of interest, a Proponent shall not include in its submission another Proponent as a member of its Consultant Team, as a sub-consultant or specialist consultant.
5. Any joint venture entered into for the provision of professional services or other services must be in full compliance with the requirements of any provincial or territorial law pertaining thereto in the Province or Territory in which the project is located.

#### **GI 14 Licensing Requirements**

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

#### **GI 15 Rejection of Proposal**

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

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

#### **GI 16 Insurance Requirements**

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

#### **GI 17 Joint Venture**

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

2. If the information is not clearly provided in the proposal, the Proponent must provide the information on request from the Contracting Authority.
3. Additional information regarding Joint Venture Procurement Business Number, Offerors should refer to [Supplier Registration Information](#) or InfoLine at 1-800-811-1148.
4. The proposal and any resulting standing offer must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of all members of the joint venture. The Contracting Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the RFSO and any resulting standing offer. If a standing offer is issued to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of any contract resulting from a call-up against the standing offer.

#### **GI 18 Late Submissions**

1. Proposals submitted after the date and time set for the closing of the Request for Standing Offers will be declared non-responsive unless they qualify as a delayed proposals as described in GI 18.2.
2. A proposal received by the specified Bid Receiving Unit after the solicitation closing date and time but before the standing offer award date may be considered, provided the Proponent can prove the delay is due solely to a delay in delivery that can be attributed to the Canada Post Corporation (CPC).

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

#### **GI 19 Legal Capacity**

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

#### **GI 20 Debriefing**

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

#### **GI 21 Financial Capability**

1. The Proponent must have the financial capability to fulfill this requirement. To determine the Proponent's financial capability, the Contracting Authority may, by written notice to the Proponent, require the submission of some or all of the financial information detailed below during the evaluation of proposals. The Proponent must provide the following information to the Contracting Authority within fifteen (15) working days of the request or as specified by the Contracting Authority in the notice:

- (a) Audited financial statements, if available, or the unaudited financial statements (prepared by the Proponent's outside accounting firm, if available, or prepared in-house if no external statements have been prepared) for the Proponent's last three fiscal years, or for the years that the Proponent has been in business if this is less than three years (including, as a minimum, the Balance Sheet, the Statement of Retained Earnings, the Income Statement and any notes to the statements).
  - (b) If the date of the financial statements in (a) above is more than five months before the date of the request for information by the Contracting Authority, the Proponent must also provide, unless this is prohibited by legislation for public companies, the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement), as of two months before the date on which the Contracting Authority requests this information.
  - (c) If the Proponent has not been in business for at least one full fiscal year, the following must be provided:
    - (i) the opening Balance Sheet on commencement of business (in the case of a corporation, the date of incorporation); and
    - (ii) the last quarterly financial statements (consisting of a Balance Sheet and a year-to-date Income Statement) as of two months before the date on which the Contracting Authority requests this information.
  - (d) A certification from the Chief Financial Officer or an authorized signing officer of the Proponent that the financial information provided is complete and accurate.
  - (e) A confirmation letter from all of the financial institution(s) that have provided short-term financing to the Proponent outlining the total of lines of credit granted to the Proponent and the amount of credit that remains available and not drawn upon as of one month prior to the date on which the Contracting Authority requests this information.
2. If the Proponent is a joint venture, the financial information required by the Contracting Authority must be provided by each member of the joint venture.
  3. If the Proponent is a subsidiary of another company, then any financial information in 1. (a) to (e) above required by the Contracting Authority must be provided by the ultimate parent company. Provision of parent company financial information does not by itself satisfy the requirement for the provision of the financial information of the Proponent, and the financial capability of a parent cannot be substituted for the financial capability of the Proponent itself unless an agreement by the parent company to sign a Parental Guarantee, as drawn up by Public Works and Government Services Canada (PWGSC), is provided with the required information.
  4. The Proponent is not required to resubmit any financial information requested by the Contracting Authority that is already on file at PWGSC with the Contract Cost Analysis, Audit and Policy Directorate of the Policy, Risk, Integrity and Strategic Management Sector, provided that within the above-noted time frame:
    - (a) the Proponent identifies to the Contracting Authority in writing the specific information that is on file and the requirement for which this information was provided; and
    - (b) the Proponent authorizes the use of the information for this requirement.

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

5. Canada reserves the right to request from the Proponent any other information that Canada requires to conduct a complete financial capability assessment of the Proponent.
6. If the Proponent provides the information required above to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as permitted by the Access to Information Act, R.S., 1985, c. A-1, Section 20 (1) (b) and (c).
7. In determining the Proponent's financial capability to fulfill this requirement, Canada may consider any security the Proponent is capable of providing, at the Proponent's sole expense (for example, an irrevocable letter of credit from a registered financial institution drawn in favour of Canada, a performance guarantee from a third party or some other form of security, as determined by Canada).
8. In the event that a proposal is found to be non-compliant on the basis that the Proponent is considered NOT to be financially capable of performing the subject requirement, official notification shall be provided to the Proponent.

## **GI 22 Revisions to Proposal**

Proposals may be revised, withdrawn or resubmitted if done in writing and if received at the office designated for the receipt of proposals, on or before the date and time set for the receipt of proposals. The revised proposal must include a letter on the Proponent's letterhead or bear a signature that identifies the Proponent, and must clearly identify the change(s) to be applied to the original proposal. The revision must also include the information identified in section 2. (d) of GI 10.1.

## **GI 23 Performance Evaluation**

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

## **GI 24 Proposal Costs**

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

## **GI 25 Conflict of Interest – Unfair Advantage**

1. In order to protect the integrity of the procurement process, proponents are advised that Canada may reject a proposal in the following circumstances:
  - (a) if the Proponent, any of its sub-consultants, any of their respective employees or former employees was involved in any manner in the preparation of the Request for Standing Offers or in any situation of conflict of interest or appearance of conflict of interest;
  - (b) if the Proponent, any of its sub-consultants, any of their respective employees or former employees had access to information related to the Request for Standing Offers that



was not available to other proponents and that would, in Canada's opinion, give or appear to give the Proponent an unfair advantage.

2. The experience acquired by a Proponent who is providing or has provided the goods and services described in the Request for Standing Offers (or similar goods or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This Proponent remains however subject to the criteria established above.
3. Where Canada intends to reject a proposal under this section, the Contracting Authority will inform the Proponent and provide the Proponent an opportunity to make representations before making a final decision. Proponents who are in doubt about a particular situation should contact the Contracting Authority before bid closing. By submitting a proposal, the Proponent represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Proponent acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

#### **GI 26 Limitation of Liability**

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

#### **GI 27 Status and Availability of Resources**

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

#### **GI 28 Code of Conduct for Procurement – Proposal**

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

#### **GI 29 Bid Challenge and Recourse Mechanisms**

1. Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.
2. 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)



3. 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

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

### **SI 1 Federal Contractors Program for Employment Equity – Certification**

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

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

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

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

### **SI 2 Security Requirements**

Proponents are hereby informed that there is a strong possibility that some call-ups against the Standing Offers might require that the consultants and their personnel possesses a Facility Security Clearance (FSC) at the SECRET level issued by the Contract Security Program of Public Works and Government Services Canada (PWGSC).

Should the successful proponents not have the level of security indicated above, PWGSC will sponsor the successful proponents so its Contract Security Program can initiate procedures for security clearance. The Contract Security Program, by letter, will forward documentation to the successful proponents for completion.

Proponents desiring such sponsorship should so indicate in their covering letter with their proposal.

Successful proponent(s) issued a standing offer as a result of this RFSO, not possessing the required security clearance at time of call up, will be bypassed and PWGSC will proceed to the next consultant who possesses the required security clearance and is furthest away from the ideal business distribution. Refer to the Standing Offer Particulars for information regarding ideal business distribution.

## **STANDING OFFER PARTICULARS (SOP)**

**SOP 1 General**

**SOP 2 Withdrawal/Revision**

**SOP 3 Period of the Standing Offer**

**SOP 4 Call-Up Limitation**

**SOP 5 Call-Up Procedure**

## **SOP 1 General**

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

## **SOP 2 Withdrawal/Revision**

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

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

## **SOP 3 Period of the Standing Offer**

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

The Consultant grants to Canada the irrevocable option to extend the term of the Standing Offer by up to two additional one year periods under the same conditions and at the rates specified in the Standing Offer. The decision to exercise the option(s) to extend the term is at the sole discretion of Canada.

In the event that Canada decides to exercise an option to extend the Standing Offer period, Canada will notify the Consultant of the decision before the expiry date of the Standing Offer or the previously extended period as the case may be. An amendment to the Standing Offer will be issued by the Contracting Authority to document the extended period.

## **SOP 4 Call-Up Limitation**

Each call-up against the Standing Offer will have a maximum limitation of expenditure of \$2,000,000.00 (Applicable Taxes included). The call-up limitation includes fees and all related disbursements.

## **SOP 5 Call-Up Procedure**

1. Services will be called-up as follows:

- (a) The Departmental Representative will establish the scope of services to be performed. For each individual Call-Up, consultants will be considered using a computerized distribution system. This system will track all call-ups assigned to each consultant and will maintain a running total of the dollar value of business distributed. The system will contain for each consultant an ideal business distribution percentage which has been established as follows; 30% of the business for the top ranked consultant, 25% for the 2nd ranked consultant, 20% for the 3rd ranked consultant, 15% for the 4th ranked consultant, and 10% for the 5th. In the event fewer than five (5) consultants are successful, the undistributed % of business will be redistributed amongst the offerors being recommended using the following formula:
  - i. Revised Distributions % =  $\frac{\text{pre-established \%}}{100 \text{ less the non-distributed \%}} \times 100$
  - ii. The Consultant who is furthest under their respective ideal business distribution percentage in relation to the other consultants will be selected for the next call-up.
- (b) If a Consultant is approached to provide services, the Consultant must provide Canada an acknowledgement of acceptance or refusal to provide the services within 2 business days. Not respecting the 2 day timeline may result in Canada approaching the next Consultant furthest away from their respective ideal business distribution percentage.
- (c) The Consultant shall submit a proposal for the required scope of services to the Departmental Representative in accordance with the hourly rates established under the Standing Offer. The Consultant's proposal shall include the category of personnel, name of personnel and the number of hours estimated/required to perform the services, as well as an estimate of proposed disbursements, if applicable.
- (d) A fixed fee or, where it is not possible or appropriate to agree upon a fixed fee, a time based fee to an upset limit will be established in accordance with the hourly rate(s) established in the Standing Offer.
- (e) Fees for services not identified in the Standing Offer and for translation of written deliverables as requested by Canada will be established as follows:
  - i. *Where provided by the Consultant (or a Sub-Consultant named in this Standing Offer) under their own forces:*
    - a. In accordance with the methodology described in sections c. and d. above as appropriate; or,
    - b. Should there be no comparable hourly rate in the Standing Offer for such services, the Departmental Representative and the Consultant will agree to a fair and reasonable hourly rate.
  - ii. *Where provided by a third party Sub-Consultant:* In accordance with TP 10.2 and supported by such detail as requested by the Departmental Representative.

Should the Consultant and Canada be unable to agree to a fair and reasonable rate for any of the above, Canada, in it's and absolute discretion, may move to the next Consultant for the call-up of services.

- (f) If the Consultant is unable to provide the services of an individual named in its proposal (submitted in response to the Request for Standing Offer), the Consultant may propose a substitute with at least the same qualifications and experience in the estimation of Canada. The Consultant must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement for Canada's approval in its sole discretion. If the Consultant is unable to provide a substitute with similar qualifications and experience, Canada may move to the next Consultant for the call-up of services OR set aside the Standing Offer, both at Canada's sole and absolute discretion.
  - (g) Standing Offer holders not possessing the required security clearance at time of call up, will not be given the request for services and PWGSC will proceed to the next consultant who possesses the required security clearance.
  - (h) The Consultant will be authorized in writing by the Contracting Authority to proceed with the services by issuance of a Call-up against the Standing Offer.
2. Any proposed changes to the scope of work are to be discussed with the Departmental Representative but any resulting changes can only be authorized by an amendment issued by the Contracting Authority.

## **TERMS AND CONDITIONS**

**GENERAL CONDITIONS (GC)**

**SUPPLEMENTARY CONDITIONS (SC)**

**TERMS OF PAYMENT (TP)**

**CONSULTANT SERVICES (CS)**

**CALCULATION OF FEES (CF)**

## **GENERAL CONDITIONS**

- GC 1 Definitions**
- GC 2 Interpretations**
- GC 3 Assignment**
- GC 4 Indemnification**
- GC 5 Notices**
- GC 6 Suspension**
- GC 7 Termination**
- GC 8 Taking the Services Out of the Consultant's Hands**
- GC 9 Time and Cost Records to be Kept by the Consultant**
- GC 10 National or Departmental Security**
- GC 11 Rights to Intellectual Property**
- GC 12 Conflict of Interest and Values and Ethics Codes for the Public Service**
- GC 13 Contracting Authority**
- GC 14 Status of Consultant**
- GC 15 Declaration by Consultant**
- GC 16 Insurance Requirements**
- GC 17 Resolution of Disagreements**
- GC 18 Amendments**
- GC 19 Entire Agreement**
- GC 20 Contingency Fees**
- GC 21 Harassment in the Workplace**
- GC 22 Taxes**
- GC 23 Invoicing**
- GC 24 Changes in the Consultant Team**
- GC 25 Joint and Several Liability**
- GC 26 Performance evaluation - contract**
- GC 27 International Sanctions**
- GC 28 Integrity Provisions - Standing Offer**
- GC 29 Code of Conduct for Procurement – Standing Offer**
- GC 30 Transition to an E-Procurement Solution (EPS)**



## **GC 1 Definitions**

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

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

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

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

### **Canada, Crown, Her Majesty or the Government**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

## **GC 2 Interpretations**

1. Words importing the singular only also include the plural, and vice versa, where the context requires;
2. Headings or notes in the Standing Offer shall not be deemed to be part thereof, or be taken into consideration in its interpretation;

3. "Herein", "hereby", "hereof", "hereunder" and similar expressions refer to the Standing Offer as a whole and not to any particular subdivision or part thereof.

### **GC 3 Assignment**

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

### **GC 4 Indemnification**

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

### **GC 5 Notices**

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

### **GC 6 Suspension**

1. The Departmental Representative may require the Consultant to suspend the Services being provided, or any part thereof, for a specified or unspecified period.
2. If a period of suspension does not exceed sixty (60) days and when taken together with other periods of suspension does not exceed ninety (90) days, the Consultant will, upon the expiration of that period, resume the performance of the Services in accordance with the terms of the Standing Offer and the relevant Call-up, subject to any agreed adjustment of the time schedule as referred to in clause **CS 3**, Consultant Services.
3. If a period of suspension exceeds sixty (60) days or when taken together with other periods of suspension, the total exceeds ninety (90) days, and:
  - (a) the Departmental Representative and the Consultant agree that the performance of the Services shall be continued, then the Consultant shall resume performance of the Services, subject to any terms and conditions agreed upon by the Departmental Representative and the Consultant, or

- (b) the Departmental Representative and the Consultant do not agree that the performance of the Services shall be continued, then the Call-Up shall be terminated by notice given by Canada to the Consultant, in accordance with the terms of GC 7.

4. Suspension costs related to this clause are as outlined in clause **TP 8**, Terms of Payment.

#### **GC 7 Termination**

Canada may terminate any Call-up at any time in its sole discretion, and the fees paid to the Consultant will be in accordance with the relevant provisions in clause **TP 9**, Terms of Payment.

#### **GC 8 Taking the Services Out of the Consultant's Hands**

1. Canada may take all or any part of the Services out of the Consultant's hands and may employ reasonable means necessary to complete such Services in the event that:
  - (a) The Consultant has become insolvent or has committed an act of bankruptcy, and has neither made a proposal to the Consultant's creditors nor filed a notice of intention to make such a proposal, pursuant to the Bankruptcy and Insolvency Act, or
  - (b) the Consultant fails to perform any of the Consultant's obligations under the Standing Offer or any of the Call-ups or, in Canada's opinion, so fails to make progress as to endanger performance of the Standing Offer or any of its call-ups, in accordance with its terms.
2. If the Consultant has become insolvent or has committed an act of bankruptcy, and has either made a proposal to the Consultant's creditors or filed a notice of intention to make such a proposal, pursuant to the Bankruptcy and Insolvency Act, the Consultant shall immediately forward a copy of the proposal or the notice of intention to the Contracting Authority.
3. Before the Services or any part thereof are taken out of the Consultant's hands under GC 8.1 (b), the Departmental Representative will provide notice to the Consultant, and may require such failure of performance or progress to be corrected. If within fourteen (14) days after receipt of notice the default is not corrected or corrective action is not initiated to correct such fault, Canada may, by notice, without limiting any other right or remedy, take all or any part of the Services out of the Consultant's hands.
4. If the Services or any part thereof have been taken out of the Consultant's hands, the Consultant will be liable for, and upon demand pay to Canada, an amount equal to all loss and damage suffered by Canada by reason of the non-completion of the Services by the Consultant.
5. If the Consultant fails to pay on demand for the loss or damage as a result of GC 8.4, Canada will be entitled to deduct and withhold the same from any payments due and payable to the Consultant.
6. The taking of the Services, or any part thereof, out of the Consultant's hands does not relieve or discharge the Consultant from any obligation under the Standing Offer, the Call-up, or imposed upon the Consultant by law, in respect to the Services or any part thereof that the Consultant has performed.

#### **GC 9 Time and Cost Records to be Kept by the Consultant**

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

#### **GC 10 National or Departmental Security**

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

#### **GC 11 Rights to Intellectual Property**

1. Definitions

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

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

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

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

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

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

## 2. Identification and Disclosure of Foreground

The Consultant shall:

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

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

## 3. IP Rights Vest with Consultant

Subject to articles GC 11.10 and GC 11.11 and the provisions of GC 10 National or Departmental Security, and without affecting any IP Rights or interests therein that have come into being prior to the Standing Offer and/or Call-Up or that relate to information or data supplied by Canada for the purposes of the Standing Offer and/or Call-Up, all IP Rights in the Foreground shall immediately, as soon as they come into existence, vest in and remain the property of the Consultant.

## 4. Ownership Rights in Deliverables

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

## 5. Licence to Foreground

Without limiting any implied licences that may otherwise vest in Canada, and in consideration of Canada's contribution to the cost of development of the Foreground, the Consultant hereby grants to Canada a non-exclusive, perpetual, irrevocable, worldwide, fully-paid and royalty-free licence to exercise all IP Rights in the Foreground that vest in the Consultant pursuant to article GC 11.3, for the purpose of:

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

6. Licence to Foreground for Other Projects

The Consultant hereby grants to Canada a non-exclusive, perpetual, world-wide, irrevocable licence to exercise all IP Rights that vest in the Consultant pursuant to paragraph GC 11.3 for the purpose of planning, designing and constructing or otherwise implementing any project other than the Project, and for any purpose set out in paragraph GC 11.5 as it relates to such other project. In the event that Canada exercises such IP Rights in another project, and provided that Canada does not already have equivalent rights under a previous contract or otherwise, Canada agrees to pay to the Consultant reasonable compensation determined in accordance with current industry practice and having regard to Canada's contribution to the cost of development of the Foreground. The Consultant shall ensure that in any sale, assignment, transfer or licence of any of the IP Rights that vest in the Consultant under the Standing Offer and/or Call-Up, the purchaser, assignee, transferee or licensee agrees to be bound by the terms of this provision and to accept reasonable compensation as is contemplated herein. The Consultant shall also ensure that any such purchaser, assignee, transferee or licensee of the IP Rights is required to impose the same obligations on any subsequent purchaser, transferee, assignee or licensee.

7. Licence to Background

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

- (a) for the purposes contemplated in article GC 11.5 and GC 11.6;
- (b) for disclosure to any contractor engaged by Canada, or bidder for such a contract, to be used solely for a purpose set out in article GC 11.5 and GC 11.6;

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

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



The Consultant acknowledges that Canada may wish to award contracts, which may include a competitive process, for any of the purposes contemplated in article GC 11.5, GC 11.6 and GC 11.7. The Consultant agrees that Canada's licence in relation to the IP Rights in the Foreground and in the Background, includes the right to disclose that Foreground and Background to bidders for such contracts, and to sub-license or otherwise authorize the use of that Foreground and Background by any contractor or consultant engaged by Canada for the purpose of carrying out such a contract.

9. Consultant's Right to Grant Licence

- (a) The Consultant represents and warrants that the Consultant has, or the Consultant shall obtain without delay, the right to grant to Canada the licence to exercise the IP Rights in the Foreground and the Background as required by the Standing Offer and/or Call-Up.
- (b) Where the IP Rights in any Background or Foreground are or will be owned by a Sub-Consultant, the Consultant shall either obtain a licence from that Sub-Consultant that permits compliance with articles GC 11.5, GC 11.6 and GC 11.7 or shall arrange for the Sub-Consultant to convey directly to Canada the same rights by execution of the form provided for that purpose by Canada no later than the time of disclosure to Canada of that Background and Foreground.

10. Trade Secrets and Confidential Information

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

11. Canada Supplied Information

- (a) Where performance of the Services involves the preparation of a compilation using information supplied by Canada, then the IP Rights that shall vest under paragraph GC 11.3 shall be restricted to the IP Rights in Foreground that are capable of being exploited without the use of the information supplied by Canada. All IP Rights in any compilation, the Foreground in which cannot be exploited without the use of such Canada supplied information shall vest in Canada. The Consultant agrees that the Consultant shall not use or disclose any Canada supplied information for any purpose other than completing the performance of the Services. The Consultant shall maintain the confidentiality of such information. Unless the Standing Offer and/or Call-Up otherwise expressly provides, the Consultant shall deliver to Canada all such information together with every copy, draft, working paper and note thereof that contains such information upon the completion or termination of the Standing Offer and/or Call-Up, or at such earlier time as Canada may require.
- (b) If the Consultant wishes to make use of any Canada supplied information that was supplied for purposes of the Standing Offer and/or Call-Up, for the commercial exploitation or further development of any of the Foreground, then the Consultant may make a written request for a licence to exercise the required IP Rights in that Canada supplied information, to Canada. The Consultant shall give Canada an explanation as to why such a licence is required. Should Canada agree to grant such a licence, it shall be on terms and conditions to be negotiated between the parties including payment of compensation to Canada.

12. Transfer of IP Rights

- (a) If Canada takes the Services out of the Consultant's hands in accordance with GC 8 of the General Conditions, in whole or in part, or if the Consultant fails to disclose any Foreground in accordance with article GC 11.2, Canada may upon reasonable notice,



require the Consultant to convey to Canada all of the IP Rights in the Foreground or in the case of a failure to disclose, all the IP Rights in the Foreground not provided. The IP Rights to be conveyed shall include the IP Rights in any Foreground that have vested or are to vest in a Sub-Consultant. In the case of IP Rights in Foreground which have been sold or assigned to a party other than a Sub-Consultant, the Consultant shall not be obligated to convey those IP Rights to Canada, but shall pay to Canada on demand an amount equal to the consideration which the Consultant received from the sale or assignment of the IP Rights in that Foreground or, in the case of a sale or assignment was not at arm's length, the fair market value of the IP Rights in that Foreground, in each case including the value of future royalties or licence fees.

- (b) In the event of the issuance by Canada of a notice referred to in (a), the Consultant shall, at the Consultant's own expense and without delay, execute such conveyances or other documents relating to title to the IP Rights as Canada may require, and the Consultant shall, at Canada's expense, afford Canada all reasonable assistance in the preparation of applications and in the prosecution of any applications for, or any registration of, any IP Right in any jurisdiction, including without limitation the assistance of the inventor in the case of Inventions.
- (c) Until the Consultant completes the performance of the Services and discloses all of the Foreground in accordance with article GC 11.2, and subject to the provisions of GC 10 National or Departmental Security, the Consultant shall not, without the prior written permission of Canada, sell, assign or otherwise transfer title to the IP Rights in any of the Foreground, or license or otherwise authorize the use of the IP Rights in any of the Foreground by any person.
- (d) In any sale, assignment, transfer or licence of IP Rights in Foreground by the Consultant except a sale or licence for end use of a product based on Foreground, the Consultant shall impose on the other party all of its obligations to Canada in relation to the IP Rights in the Foreground and any restrictions set out in the Standing Offer and/or Call-Up on the use or disposition of the IP Rights in the Foreground (and, if applicable, the Foreground itself), including the obligation to impose the same obligations and restrictions on any subsequent transferee, assignee or licensee. The Consultant shall promptly notify Canada of the name, address and other pertinent information in regard to any transferee, assignee or licensee.

## **GC 12 Conflict of Interest and Values and Ethics Codes for the Public Service**

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

5.
  - (a) The Consultant shall not be eligible to compete as a consultant or sub-consultant for a project which may result from the provision of the Services if the Consultant is involved in the development of a Project Brief or Terms of Reference, a Request for Proposal or similar documents for such project.
  - (b) The Consultant providing certain pre-design services (e.g. studies, analysis, schematic design) that do not involve the development of a Project Brief, Terms of Reference, Request for Proposal or similar documents for such project may be eligible to compete as a consultant or sub-consultant for a project which may result from the provision of these services. The experience acquired by a Consultant who has only provided pre-design services, where the information / documentation resulting from these services is made available to other proponents, will not be considered by Canada as conferring an unfair advantage or creating a conflict of interest.

### **GC 13 Contracting Authority**

#### Standing Offer Contracting Authority:

Marc Lanthier  
Supply Specialist  
Real Property Contracting Directorate  
Public Works and Government Services Canada  
[marc.lanthier@pwgsc.gc.ca](mailto:marc.lanthier@pwgsc.gc.ca)

The Contracting Authority is responsible for the establishment and administration of the Standing Offer and its revision if needed. The Contracting Authority is responsible for all contractual related questions regarding call-ups.

### **GC 14 Status of Consultant**

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

### **GC 15 Declaration by Consultant**

The Consultant declares that:

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

### **GC 16 Insurance Requirements**

#### 1. General

- (a) The Consultant shall ensure that appropriate liability insurance coverage is in place to cover the Consultant and the members of the Consultant Team and shall maintain all required insurance policies as specified herein.

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

2. Commercial General Liability

- (a) The insurance coverage provided shall not be less than that provided by IBC Form 2100, as amended from time to time, and shall have: a limit of liability of not less than \$5,000,000.00 per occurrence; an aggregate limit of not less than \$5,000,000.00 within any policy year.
- (b) The policy shall insure the Consultant and shall include Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services as an Additional Insured, with respect to liability arising out of the performance of the Services.

3. Professional Liability

- (a) The Professional Liability insurance coverage shall be in an amount usual for the nature and scope of the Services but, shall have a limit of liability of not less than \$1,000,000.00 per claim, and be continually maintained from the commencement of performance of the Services until five (5) years after their completion.
- (b) Notice of Cancellation of Insurance Coverage: The Consultant shall immediately advise the Contracting Authority in writing upon being informed or in receipt of any notification of a pending cancellation of its professional Liability insurance or of any reduction to the claim limits it maintains.

**GC 17 Resolution of Disagreements**

- 1. In the event of a disagreement regarding any aspect of the Services or any instructions given under the Standing Offer and subsequent Call-ups:
  - (a) The Consultant may give a notice of disagreement to the Departmental Representative. Such notice shall be promptly given and contain the particulars of the disagreement, any changes in time or amounts claimed, and reference to the relevant clauses of the Standing Offer and Call-up;
  - (b) The Consultant shall continue to perform the Services in accordance with the instructions of the Departmental Representative; and
  - (c) The Consultant and the Departmental Representative shall attempt to resolve the disagreement by negotiations conducted in good faith. The negotiations shall be conducted, first, at the level of the Consultant's project representative and the Departmental Representative and, secondly and if necessary, at the level of a principal of the Consultant firm and a senior departmental manager.

2. The Consultant's continued performance of the Services in accordance with the instructions of the Departmental Representative shall not jeopardize the legal position of the Consultant in any disagreement.
3. If it was subsequently agreed or determined that the instructions given were in error or contrary to the Standing Offer or Call-up, Canada shall pay the Consultant those fees the Consultant shall have earned as a result of the change(s) in the Services provided, together with those reasonable disbursements arising from the change(s) and which have been authorized by the Departmental Representative.
4. The fees mentioned in GC 17.3 shall be calculated in accordance with the Terms of Payment set out in the Standing Offer and the relevant Call-up.
5. If the disagreement is not settled, the Consultant may make a request to the Departmental Representative for a written departmental decision and the Departmental Representative shall give notice of the departmental decision within fourteen (14) days of receiving the request, setting out the particulars of the response and any relevant clauses of the Standing Offer or Call-up.
6. Within fourteen (14) days of receipt of the written departmental decision, the Consultant shall notify the Departmental Representative if the Consultant accepts or rejects the decision.
7. If the Consultant rejects the departmental decision, the Consultant, by notice, may refer the disagreement to Mediation.
8. If the disagreement is referred to Mediation, the Mediation shall be conducted with the assistance of a skilled and experienced mediator chosen by the Consultant from a list of mediators proposed by Canada, and departmental Mediation procedures shall be used unless the parties agree otherwise.
9. Negotiations conducted under the Standing Offer and any resulting Call-up, including those conducted during Mediation, shall be without prejudice.

#### **GC 18 Amendments**

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

#### **GC 19 Entire Agreement**

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

#### **GC 20 Contingency Fees**

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

## **GC 21 Harassment in the Workplace**

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

## **GC 22 Taxes**

1. Federal government departments and agencies are required to pay Applicable Taxes.
2. Applicable Taxes will be paid by Canada as provided in the invoice submission. Applicable Taxes must be specified on all invoices as a separate item along with corresponding registration numbers from the tax authorities. All items that are zero-rated, exempt or to which these Applicable Taxes do not apply must be identified as such on all invoices. It is the sole responsibility of the Consultant to charge Applicable Taxes at the correct rate in accordance with applicable legislation. The Consultant agrees to remit to appropriate tax authorities any amounts of Applicable Taxes paid or due.
3. The Consultant is not entitled to use Canada's exemptions from any tax, such as provincial sales taxes, unless otherwise specified by law. The Consultant must pay applicable provincial sales tax, ancillary taxes, and any commodity tax, on taxable goods or services used or consumed in the performance of the contract (in accordance with applicable legislation), including for material incorporated into real property.
4. In those cases where Applicable Taxes, customs duties, and excise taxes are included in the Contract Price, the Contract Price will be adjusted to reflect any increase, or decrease, of Applicable Taxes, customs duties, and excise taxes that will have occurred between bid submission and contract award. However, there will be no adjustment for any change to increase the Contract Price if public notice of the change was given before bid submission date in sufficient detail to have permitted the Consultant to calculate the effect of the change.
5. Tax Withholding of 15 Percent - Canada Revenue Agency

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

## **GC 23 Invoicing**

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

Amount this invoice	(1)	Fees + Applicable Taxes = Total
---------------------	-----	---------------------------------

- |                                 |             |                                 |
|---------------------------------|-------------|---------------------------------|
| Total previous invoices         | (2)         | Fees + Applicable Taxes = Total |
| Total invoiced to date          | (1+2) = (3) | Fees + Applicable Taxes = Total |
| Agreed fees                     | (4)         | Fees + Applicable Taxes = Total |
| Amount to complete              | (4-3) = (5) | Fees + Applicable Taxes = Total |
| % Services completed this stage | (6)         |                                 |
- (e) Authorized signatures of the Consultant and the date.

2. Include with each invoice for authorized disbursements, receipt of original invoices (or legible copies if originals cannot be supplied) for all items claimed.

#### **GC 24 Changes in the Consultant Team**

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

#### **GC 25 Joint and Several Liability**

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

#### **GC 26 Performance evaluation - contract**

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

The form PWGSC-TPSGC 2913-1, Select - Consultant Performance Evaluation Report (CPERF), will be used by the Departmental Representative to record the performance.

## **GC 27 International Sanctions**

1. Persons in Canada, and Canadians outside of Canada, are bound by economic sanctions imposed by Canada. As a result, the Government of Canada cannot accept delivery of goods or services that originate, either directly or indirectly, from the countries or persons subject to economic sanctions (<http://www.international.gc.ca/sanctions/index.aspx?lang=eng>).
2. The Consultant must not supply to the Government of Canada any goods or services which are subject to economic sanctions.
3. The Consultant must comply with changes to the regulations imposed during the period of the Call-Up. The Consultant must immediately advise Canada if it is unable to perform the Services



as a result of the imposition of economic sanctions against a country or person or the addition of a good or service to the list of sanctioned goods or services. If the parties cannot agree on a work around plan, the Call-Up will be terminated for the convenience of Canada in accordance with terms and conditions of the Standing Offer and/or Call-Up.

#### **GC 28 Integrity Provisions - Standing Offer**

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

#### **GC 29 Code of Conduct for Procurement – Standing Offer**

The Consultant agrees to comply with the Code of Conduct for Procurement and to be bound by its terms for the period of the Standing Offer and any resulting contracts.

#### **GC 30 Transition to an E-Procurement Solution (EPS)**

During the period of the Standing Offer, Canada may transition to an EPS for more efficient processing and management of individual call-ups for any or all of the SO's applicable goods and services. Canada reserves the right, at its sole discretion, to make the use of the new e-procurement solution mandatory.

Canada agrees to provide the Offeror with at least a three-month notice to allow for any measures necessary for the integration of the Offer into the EPS. The notice will include a detailed information package indicating the requirements, as well as any applicable guidance and support.

If the Offeror chooses not to offer their goods or services through the e-procurement solution, the Standing Offer may be set aside by Canada.



## **SUPPLEMENTARY CONDITIONS**

### **SC 1 Language Requirements**

### **SC 2 Federal Contractors Program for Employment Equity - Setting aside and Default by the Consultant**

### **SC 1 Language Requirements**

1. Communication between Canada and the Consultant shall be in the language of choice of the Consultant Team, which shall be deemed to be the language of the Consultant's proposal submitted in response to the Request for Standing Offers (RFSO).
2. The Consultant's Services during construction tender call (such as addenda preparation, tenderers' briefing meetings, technical answers to questions by bidders, including translation of bidder's questions) shall be provided expeditiously in both languages, as necessary.
3. The Consultant's Services during construction shall be provided in the language of choice of the Contractor. The successful Contractor will be asked to commit to one or other of Canada's official languages upon award of the Construction Contract and, thereafter construction and contract administration services will be conducted in the language chosen by the Contractor.
4. Other required services in both of Canada's official languages (such as construction documentation) are described in detail in the Standing Offer Brief.
5. The Consultant should be prepared to provide deliverables (such as reports, studies, investigations, etc.) in both of Canada's official languages. Instructions for these types of deliverables will be specified in the call-up/project's Terms of Reference (ToR).
6. The Consultant Team, including the Prime Consultant, Sub-Consultants and Specialist Consultants shall ensure that the Services being provided in either language shall be to a professional standard.

### **SC 2 Federal Contractors Program for Employment Equity - Setting aside and Default by the Consultant**

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

## **TERMS OF PAYMENT**

- TP 1 Fees**
- TP 2 Payments to the Consultant**
- TP 3 Delayed Payment**
- TP 4 Claims Against, and Obligations of the Consultant**
- TP 5 No Payment for Errors and Omissions**
- TP 6 Payment for Changes and Revisions**
- TP 7 Extension of Time**
- TP 8 Suspension Costs**
- TP 9 Termination Costs**
- TP 10 Disbursements**

### **TP 1 Fees**

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

### **TP 2 Payments to the Consultant**

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

6. Upon written notice by a Sub-Consultant, with whom the Consultant has a direct contract, of an alleged non-payment to the Sub-Consultant, the Departmental Representative may provide the Sub-Consultant with a copy of the latest approved progress payment made to the Consultant for the Services.
7. Upon the satisfactory completion of all Services, the amount due, less any payments already made, shall be paid to the Consultant not later than thirty (30) days after receipt of an acceptable invoice, together with the Statutory Declaration in accordance with TP 2.5.

### **TP 3 Delayed Payment**

1. If Canada delays in making a payment that is due in accordance with TP 2, the Consultant will be entitled to receive interest on the amount that is overdue for the period of time as defined in TP 3.2 including the day previous to the date of payment. Such date of payment shall be deemed to be the date on the cheque given for payment of the overdue amount. An amount is overdue when it is unpaid on the first day following the due date described in TP 2.1.
2. Interest shall be paid automatically on all amounts that are not paid by the due date or fifteen (15) days after the Consultant has delivered a Statutory Declaration in accordance with TP 2.5 or TP 2.7, whichever is the later.
3. The rate of interest shall be the Average Bank Rate plus 3 percent per year on any amount which is overdue pursuant to TP 3.1.

### **TP 4 Claims Against, and Obligations of the Consultant**

1. Canada may, in order to discharge lawful obligations of and satisfy lawful claims against the Consultant by a Sub-Consultant, with whom the Consultant has a direct contract, for Services rendered to, or on behalf of, the Consultant, pay an amount from money that is due and payable to the Consultant directly to the claimant Sub-Consultant.
2. For the purposes of TP 4.1 a claim shall be considered lawful when it is so determined:
  - (a) by a court of legal jurisdiction, or
  - (b) by an arbitrator duly appointed to arbitrate the said claim, or
  - (c) by a written notice delivered to the Departmental Representative and signed by the Consultant authorizing payment of the said claim or claims.
3. A payment made pursuant to TP 4.1 is, to the extent of the payment, a discharge of Canada's liability to the Consultant under a specific Call-up and will be deducted from any amount payable to the Consultant under any active Call-up.
4. TP 4.1 shall only apply to claims and obligations
  - (a) The notification of which has set forth the amount claimed to be owing and a full description of the Services or a part of the Services for which the claimant has not been paid. The notification must be received by the Departmental Representative in writing before the final payment is made to the Consultant and within one hundred twenty (120) days of the date on which the claimant
    - (i) should have been paid in full under the claimant's agreement with the Consultant where the claim is for an amount that was lawfully required to be held back from the claimant; or

- (ii) performed the last of the Services pursuant to the claimant's agreement with the Consultant where the claim is not for an amount referred to in TP 4.4 (a)(i), and
  - (b) the proceedings to determine the right to payment of which shall have commenced within one year from the date that the notification referred to in TP 4.4 (a) was received by the Departmental Representative.
- 5. Canada may, upon receipt of a notification of claim referred to in TP 4.4 (a), withhold from any amount that is due and payable to the Consultant pursuant to a Call-up the full amount of the claim or any portion thereof.
- 6. The Departmental Representative shall notify the Consultant in writing of receipt of any notification of claim and of the intention of Canada to withhold funds pursuant to TP 4.5. The Consultant may, at any time thereafter and until payment is made to the claimant, post with Canada, security in a form acceptable to Canada in an amount equal to the value of the said claim. Upon receipt of such security Canada shall release to the Consultant any funds which would be otherwise payable to the Consultant, that were withheld pursuant to the provision of TP 4.5.
- 7. The Consultant shall discharge all lawful obligations and shall satisfy all lawful claims against the Consultant for Services rendered to, or on behalf of, the Consultant in respect of this Standing Offer at least as often as this Standing Offer requires Canada to discharge its obligations to the Consultant.

#### **TP 5 No Payment for Errors and Omissions**

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

#### **TP 6 Payment for Changes and Revisions**

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

#### **TP 7 Extension of Time**

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

#### **TP 8 Suspension Costs**

- 1. During a period of suspension of the Services pursuant to **GC 6**, General Conditions, the Consultant shall minimize all costs and expenses relating to the Services that may occur during the suspension period.

2. Within fourteen (14) days of notice of such suspension, the Consultant shall submit to the Departmental Representative a schedule of costs and expenses, if any, that the Consultant expects to incur during the period of suspension, and for which the Consultant will request reimbursement.
3. Payment shall be made to the Consultant for those costs and expenses that, in the opinion of Canada, are substantiated as having been reasonably incurred during the suspension period.

#### **TP 9 Termination Costs**

1. In the event of termination of any Call-up pursuant to clause **GC 7**, General Conditions, Canada shall pay, and the Consultant shall accept in full settlement, an amount based on these Terms of Payment, for Services satisfactorily performed and any reasonable costs and expenses incurred to terminate the Call-Up.
2. Within fourteen (14) days of notice of such termination, the Consultant shall submit to the Departmental Representative a schedule of costs and expenses reasonably incurred. The Consultant must ensure that it has mitigated its costs to the best of its ability.
3. Payment shall be made to the Consultant for those costs and expenses that in the opinion of Canada are substantiated as having been reasonably incurred after the date of termination.
4. The Consultant has no claim for damages, compensation, loss of profit, loss of opportunity, allowance or otherwise by reason of, or directly or indirectly arising out of, any action taken or termination notice given by Canada under **GC 7 Termination**.

#### **TP 10 Disbursements**

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

2. Subject to any provisions specifically to the contrary in the Supplementary Conditions, the following disbursements reasonably incurred by the Consultant, that are related to the Services and approved by the Departmental Representative, shall be reimbursed to the Consultant at actual cost:
  - (a) reproduction and delivery costs of drawings, CADD files, specifications and other Technical Documentation additional to that specified in the Standing Offer Brief;
  - (b) transportation costs for material samples and models additional to that specified in the Standing Offer Brief;
  - (c) project related travel and accommodation additional to that specified in the Standing Offer Brief shall be reimbursed in accordance with current National Joint Council (NJC) Travel Directive (<https://www.njc-cnm.gc.ca/directive/d10/en>); and
  - (d) other disbursements made with the prior approval and authorization of the Departmental Representative.
3. Disbursements shall be Project related and shall not include expenses that are related to the normal operation of the Consultant's business. The amounts payable, shall not exceed the amount entered in the Call-up, without the prior authorization of the Departmental Representative.

## **CONSULTANT SERVICES**

- CS 1 Services**
- CS 2 Standard of Care**
- CS 3 Time Schedule**
- CS 4 Project Information, Decisions, Acceptances, Approvals**
- CS 5 Changes in Services**
- CS 6 Codes, By-Laws, Licences, Permits**
- CS 7 Provision of Staff**
- CS 8 Sub-Consultants**
- CS 9 Cost Control**

### **CS 1 Services**

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

### **CS 2 Standard of Care**

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

### **CS 3 Time Schedule**

The Consultant shall:

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

### **CS 4 Project Information, Decisions, Acceptances, Approvals**

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

### **CS 5 Changes in Services**

The Consultant shall:

- (a) make changes in the Services to be provided for the Project, including changes which may increase or decrease the original scope of Services, when requested in writing by the Departmental Representative; and

- (b) prior to commencing such changes, advise the Departmental Representative of any known and anticipated effects of the changes on the Construction Cost Estimate, Consultant fees, Project Schedule, and other matters concerning the Project.

#### **CS 6 Codes, By-Laws, Licences, Permits**

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

#### **CS 7 Provision of Staff**

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

#### **CS 8 Sub-Consultants**

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

#### **CS 9 Cost Control**

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

1. Throughout Project development, the Construction Cost Estimate prepared by the Consultant shall not exceed the Construction Cost Limit.
2. In the event that the Consultant considers that the Construction Cost Estimate will exceed the Construction Cost Limit, the Consultant shall notify the Departmental Representative and
  - (a) if the excess is due to factors under the control of, or reasonably foreseeable by the Consultant, the Consultant shall, if requested by the Departmental Representative, and



at no additional cost to Canada, make such changes or revisions to the design as may be necessary to bring the Construction Cost Estimate within the Construction Cost Limit; or

- (b) if the excess is due to factors that are not under the control of the Consultant, changes or revisions may be requested by the Departmental Representative. Such changes or revisions shall be undertaken by the Consultant at Canada's expense, and the cost involved shall become an amount to be mutually agreed, prior to performance of the said changes or revisions.
- 3. If the lowest price obtained by bid process or negotiation exceeds the Construction Cost Limit, and if the excess is due to reasons within the control of, or reasonably foreseeable by the Consultant, the Consultant shall, if requested by the Departmental Representative, and without additional charge, be fully responsible for revising the Project scope and quality as required to reduce the construction cost and shall modify the construction documents as necessary to comply with the Construction Cost Limit.

## **CALCULATION OF FEES**

### **CF 1 Fee Arrangement(s) for Services**

### **CF 2 Payments for Services**

#### **CF 1 Fee Arrangement(s) for Services**

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

#### **CF 2 Payments for Services**

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

## STANDING OFFER BRIEF

Full Interior Design Services (including Functional Programs) for  
projects within the National Capital Region in the Province of  
Ontario and Quebec

### TABLE OF CONTENTS

PA 1.0	GENERAL REQUIREMENTS .....	2
PA 2.0	ROLES AND RESPONSIBILITIES.....	7
PA 3.0	GENERAL ADMINISTRATION .....	9
PA 4.0	DEFINITIONS .....	12
RS 1.0	GENERAL CONSULTANT SERVICES.....	19
RS 2.0	FUNCTIONAL PROGRAM.....	22
RS 3.0	DESIGN CONCEPT .....	33
RS 4.0	DESIGN DEVELOPMENT .....	41
RS 5.0	CONSTRUCTION DOCUMENTS .....	47
RS 6.0	TENDER CALL, BID EVALUATION & CONSTRUCTION CONTRACT AWARD	50
RS 7.0	CONSTRUCTION & CONTRACT ADMINISTRATION.....	51
RS 8.0	POST-OCCUPANCY .....	60
RS 9.0	ADDITIONAL SERVICES .....	61

## **PROJECT ADMINISTRATION (PA)**

1. Project Administration (PA) for this Standing Offer is divided into three (3) sections as per the following:
  - a) PA 1: Roles and Responsibilities;
  - b) PA 2: General Requirements; and
  - c) PA 3: Definitions.
2. The requirements described in the PA sections shall apply during all services described under RS 1 to RS 4 and shall form part of each call-up against this Standing Offer.
3. For standards relating to the required services described in this standing offer, refer to the latest "Government of Canada Workplace Fit-up Standards", the "Space Allocation Standards" and the standards set out therein shall be adhered to. It is critical that all requirements that are less than, in excess of and/ or not part of the "Government of Canada Workplace Fit-up Standards" or the "Space Allocation Standards" be clearly identified and brought to the attention of the PWGSC Departmental Representative. The Consultant is to document and assist in the reconciliation of all requirements that are less than, in excess of and/or are NOT part of the standards. All non-compliant components must respect the Government of Canada Workplace Fit-up Standards Approval and Governance process.
4. Reference shall also be made to "Doing Business" document.

### **PA 1.0 GENERAL REQUIREMENTS**

#### **PA 1.1 General Project Objectives**

Each Call-Up will elaborate on the specific objectives for individual projects however the following objectives will apply to all Call-Ups:

- 1.1.1 Ensure the project recommendations supports the goals, objectives, and parameters outlined in the fit-up agreement between the Client Department and PWGSC.
- 1.1.2 Ensure key initiatives for connectivity, and sustainable development among others (see PA 1.8: Reference Documents) are incorporated into the project in accordance with the following principles:
  - a) Maximum flexibility in terms of immediate and future use of space;
  - b) Incorporation of current technologies and innovative solutions for the total office environment while respecting the Government of Canada Workplace Fit-up Standards;
  - c) Incorporation of design principles in project solutions;
  - d) Minimization of waste from construction, renovation/refit and demolition; and
  - e) Maximization of diversion of materials through various approaches such as recycling and reuse where possible.

## **PA 1.2 Codes, By-Laws, Licenses, Permits**

- 1.2.1 The Consultant shall provide the required deliverables in accordance with CS 6: Codes, By- Laws, Licenses, and Permits. In cases of overlap, the most stringent shall apply.

## **PA 1.3 Language Requirements**

- 1.3.1 The Consultant team, including the Prime Consultant, sub-Consultants and specialists Consultants shall ensure that they are capable of providing services in both official languages as required.
- 1.3.2 The language(s) for services and deliverables shall be established at the time of call-up for each project. The Consultant shall provide the required deliverables, in accordance to agreements made at time of call-up.
- 1.3.3 The languages (English and French) are considered equal in status; neither is considered to be a translation of the other.
- 1.3.4 The Consultant shall provide the required deliverables, in accordance with SC 2: Language Requirements. Bilingual services may be required for focus groups, presentations to upper management, functional program documents, construction drawings, specifications, addenda(s) and record drawings and will be defined at time of each Call-Up.
- 1.3.5 When bilingual construction documents are required, separate construction documents shall be prepared for each official language.

## **PA 1.4 Media**

- 1.4.1 The Prime Consultant shall ensure that no member of the Consultant Team discusses the project with any third party without the consent of the Project Manager.
- 1.4.2 All media inquiries shall be directed to the Project Manager.

## **PA 1.5 Time Management & Project Scheduling**

The Prime Consultant shall:

- 1.5.1 Provide scheduling services from the beginning of the project to the post-occupancy in accordance with RS 1.3 Project Schedule.
- 1.5.2 Prepare a project schedule that identifies in a graphic format (such as Critical Path Method (CPM), or Program Evaluation Review Technique (PERT)) all activities, timeframes and milestones including critical deadlines. Time frames shall be included for submissions, reviews, revisions and approvals, as required.
- 1.5.3 Monitor the critical path and deadlines for submissions, revisions and approvals throughout the project and update on a monthly basis. Advise the PWGSC Representative of any changes that may affect schedule or budget, or are inconsistent with instructions or written approvals. Detail the extent and reasons for the changes, and obtain written approval from the PWGSC Representative before proceeding.

## PA 1.6 Cost Management Services

The Prime Consultant shall:

- 1.6.1 Provide continuous and on-going cost management services from the beginning of the project to the end of RS 3 Schematic Design, the Consultant shall provide, as required, cost management services during RS 4 Additional Services.
- 1.6.2 As defined in each call-up, prepare cost estimates ('A', 'B', 'C' and 'D') using the format developed by the Canadian Institute of Quantity Surveyors for Elemental Cost Analysis (refer to "Doing Business"). The cost estimates shall also clearly identify base building, fit-up and Client Department elements as indicated in the most recent Government of Canada Workplace Fit-up Standards. Where applicable, the estimates shall include non-compliant items and associated costs.
- 1.6.3 On an ongoing basis, alert the PWGSC Representative, in a written format, of potential cost overruns, cost savings, cost/quality modifications, scope change, or of any changes that could affect cost estimates prepared for the project. Identify the nature, reason and the total cost impact of all identified and potential cost variation.
- 1.6.4 Provide cost advising and cost monitoring services. The Consultant shall be prepared to present and defend the cost estimates, and respond to questions about project costs. The Consultant shall be expected to assist the PWGSC Representative by responding to questions about project costs and provide recommendations to ensure the project fits within prescribed cost limits.  
  
**Note:** PWGSC considers life cycle costing a necessary and important part of this process.
- 1.6.5 Ensure that the cost management services include as a minimum architectural, interior design, mechanical, electrical, furniture and equipment, inflation and contingency costs.
- 1.6.6 At the end of RS 2 Functional Program, RS 3 Schematic Design, and RS 4 Additional Services, as required, provide a Milestone Report including the required Elemental Summaries, supported by backup cost breakdown worksheets and clearly detail the process used in preparing the estimate. The detailed work sheets shall be the prime basis on which estimates will be reviewed by PWGSC. Cost comparisons and cost reports which explain the differences between each succeeding cost estimate and their cost effect shall also be required.
- 1.6.7 Fully coordinate all estimates and related approvals with the project schedule.
- 1.6.8 A typical Milestone Report will contain as a minimum:
  - a) Project Estimate Summary;
  - b) Elemental Estimate Summary;
  - c) Estimate Back-up Details;
  - d) Basis for escalation, inflation and contingency calculations;
  - e) Assumptions;
  - f) Detailed measurement and pricing;
  - g) Outline description of estimate basis;
  - h) Description of information obtained and used in the estimate;
  - i) Listing of notable inclusions and exclusions;
  - j) Risk factors and related estimated costs;
  - k) Notes on past and forecast cost estimates, and required reconciliation;

- l) Reconciliation with the Government of Canada Workplace Fit-up Standards (including but not limited to non-compliant items); and
- m) Sustainability Goal being achieved.

#### **PA 1.7 Sustainability Requirements**

- 1.7.1 The Project must meet, and exceed where indicated, applicable PWGSC standards and green building commitments (as outlined in Real Property Sustainability Handbook). The Project should not be limited to the design strategies within the rating system itself or performance level. Demonstrate a realistic, timely and life-cycle approach.
- 1.7.2 Maximize waste prevention and diversion opportunities, diverting at least 90% of Construction, Renovation and Demolition (CRD) materials from landfill through reduction, re-use and recycling (priority focus for innovative solutions on furniture, packaging and plastics) ;
- 1.7.3 Careful integration of new technologies and design strategies that respect, preserve and/or enhance designated heritage characteristics;
- 1.7.4 Strategies that recognize and capitalize on the synergies and benefits of advancing measures that are connected at building, site and where possible, community scale, supporting sustainable and active living patterns;
- 1.7.5 Use life cycle assessments and environmental product declarations (EPDs), to inform and reduce the life-cycle environmental impacts from design/material choices, functional and operational uses;
- 1.7.6 Integrate health and wellness design strategies to enhance social livability and create highly productive, healthful and comfortable environments within indoor and outdoor spaces that encourage social interaction, active living and nurture the human/nature connection. This includes:
  - a) spaces for active and passive recreation, as well as quiet contemplation/relaxation
  - b) walkable and pedestrian focussed, promoting active, human powered mobility and alternative modes of transportation
  - c) multi-functional spaces for facilitating social connections
  - d) availability and accessibility of site amenities
  - e) healthy indoor environment (i.e. integrated biophilia, daylight and space, natural shapes, forms and materials, fresh air, access to water, healthy food/food production)
- 1.7.7 Improve comfort and user experience of occupants in a responsive, intelligent, and flexible environment through SMART building, user-centric technologies that drives connectivity and productivity, enhancing space utilization and occupant engagement in addition to operational efficiency.
- 1.7.8 The Consultant must produce a Sustainable Development Strategy report from Pre-Design onwards to be re-evaluated/ updated at every project stage. It will identify and clearly detail, through narrative (as well as supporting scorecards), the Project's specific sustainability design strategies, certification requirements, and will confirm the design decisions, recommendations, limitations and any follow-up required to meet PWGSC sustainability commitments and the project's high level sustainability objectives and performance targets described herein. The strategy must also coordinate for

consistency across the multiple phases to ensure a whole-building and site strategy that enables these objectives and certification requirements.

- 1.7.9 The sustainability strategy to be developed should not be limited by or to credits/measures identified in the chosen rating tool(s). The rating tool is a guide to verify an industry recognized level of performance, but it should not alone define the sustainable design. Innovative opportunities beyond those defined in the tool should be investigated, as well as credits where compliance proves too challenging but whose intent can be met anyway. The consultant must balance the requirements of said rating systems with other Project requirements to ensure pragmatic recommendations supportive of a sustainable strategy best suited for this Project and site.
- 1.7.10 The Consultant must apply for and obtain, on behalf of PSPC, certification for the Project under an industry recognized environmental performance rating system prior to the expiration of the warranty period. The Consultant must be responsible for all tasks, including preparation of documentation and all submissions required for verification and final certification.

## **PA 1.8 Reference Documents**

- 1.8.1 The following documents can be accessed on the Publications page on the PWGSC Internet Site:
- a) Government of Canada Workplace Fit-up Standards;
  - b) Technical Reference for Office Building Design;
  - c) PWGSC National CADD Standard;
  - d) Policy on Green Procurement;
  - e) PSPC Departmental Sustainable Development Strategy
  - f) Real Property Services Sustainable Development and Environmental Strategy
  - g) Real Property Sustainability Framework; **Please note:** this will be updated and replaced by the new Real Property Sustainability Handbook to be released winter 20/21.
  - h) Federal Sustainable Development Strategy 2019-2022;
  - i) Greening Government Strategy
  - j) GoC Actions on plastic waste in federal operations
  - k) Doing Business;
  - l) National Master Specification; and
  - m) Commissioning Policy.
- 1.8.2 On the following website link you will find the GCworkplace Interior Design Resource Centre: <https://gccollab.ca/groups/about/7274666>
- 1.8.3 On the following website link you will find the Consolidated Procurement Instruments (CPIs) **Workspaces (Office):** <https://buyandsell.gc.ca/procurement-data/tender-notice/PW-PQ-956-70828>
- 1.8.4 Web site link to PWGSC Real Property publications: <http://www.tpsgc-pwgsc.gc.ca/biens-property/publications-eng.html>
- 1.8.5 The 'Policy on Green Procurement' document may be viewed on the PWGSC Internet Site at the following link: <http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>



1.8.6 Directive on Construction Occupational Health and Safety (007-2) may be requested from the PWGSC Departmental Representative.

1.8.7 At the time of Call-up, the PWGSC Design Advisor will send the Consultant's email address to the PWGSC Interior Design National Center of Expertise (IDNCOE) to receive an invitation to gain online access to all the GCworkplace Tools.

**Note:** Some of the references listed under PA 1.8 are “living” documents. The most current version is to be used at the time of the Call-up.

## **PA 2.0 ROLES AND RESPONSIBILITIES**

### **PA 2.1 PWGSC Departmental Representative**

The Public Works and Government Services Canada (PWGSC) Real Property Services Project Manager (PM) or as delegated, is the “Departmental Representative” directly concerned with this project and responsible for the delivery of the project within the pre-established parameters of scope, quality, budget and schedule. The PM has the following responsibilities:

- a) Administer the project;
- b) Establishes the approval process to be followed as well as the time frames to be adhered to;
- c) Monitor and be directly responsible for tracking the project costs, risks and schedule;
- d) Provides information to the consultant on issues such as budget and implementation strategy;
- e) Oversees the project , review and approval process to ensure that the deliverables meet PWGSC's expectations;
- f) Verifies and certifies payment requests;
- g) Provides the project team with progress status report on a regular basis and as needed; and
- h) Addresses problems that require immediate attention.

### **PA 2.2 PWGSC Design Advisor (Accommodation Management & Workplace Solutions)**

The Design Advisor (DM) provides design advisory services, collaborates with and provides strategic and technical advice to the PM while ensuring the design services related to the project are of a level and quality that meet the expectations of all stakeholders throughout all phases of the project. The DM has the following responsibilities:

- a) Assists the PM in the definition of project parameters, implementation strategy, approval process, methodologies and project schedule;
- b) Assist in defining the scope of work and Required Services.
- c) Oversee the design components, coordinate with the PWGSC Professional and Technical resources, and monitor the quality of work and consultant deliverables throughout the project.
- d) Provides Consultant with existing documentation related to the project requirements and federal government policies, standards, regulations, etc.

- e) Monitors and reviews Consultant's progress and deliverables and coordinates comments from various disciplines on conformity with approved scope, standards; and policies/guidelines for both PWGSC and/or the Client;
- f) Participates in meetings and discussions between the PM, consultants, engineers, architects and other specialists;
- g) Reviews the Consultant progress claims and requests for additional services and advises PM on impact on schedule, time frames and budget; and
- h) Identifies any problems that may impact on project delivery to the PM and recommends remedial action.

### **PA 2.3 Consultant**

The Consultant shall:

- 2.3.1 Carry out services in accordance with approved documents and directions given by the PWGSC Representative.
- 2.3.2 Establish and maintain, throughout the duration of the Standing Offer, a Consultant team capable of effectively delivering the services described in this document.
- 2.3.3 Be capable of providing the following services:
  - a) Functional Programming;
  - b) Interior Design;
  - c) Architectural;
  - d) Mechanical Engineering;
  - e) Electrical Engineering;
  - f) Project Coordinator/Manager;
  - g) Scheduling;
  - h) Cost Control;
  - i) Risk Management; and
  - j) Sustainable Design.
- 2.3.4 Be capable of providing the following additional services among others 'as and when' required:
  - a) Change Management;
  - b) Acoustical Engineer;
  - c) Building Code;
  - d) Structural Engineering;
  - e) Communications/Data Engineering;
  - f) Lighting Design;
  - g) Way finding and Signage Design;
  - h) Security;
  - i) Ergonomics;
  - j) Fire Protection;
  - k) Building Historian; and
  - l) Audio Visual.
- 2.3.5 Prior to starting any project, obtain the PWGSC Representative's approval of other sub-Consultant(s). Upon receipt of written confirmation from the PWGSC Representative that the proposed sub-consultant(s) are acceptable, the Contracting Authority shall execute the Call-up.

- 2.3.6 Upon execution of the Call-up, demonstrate the availability of adequate resources within the Consultant team to deliver the required deliverables in a timely and cost effective manner.
- 2.3.7 Gather all information required to identify the functional requirements of the Client and incorporate those functional requirements into the required deliverables.
- 2.3.8 Manage and coordinate the Consultant's project team and sub-Consultants.
- 2.3.9 Take into consideration all base building work and incorporate base building requirements anticipated to affect the project, into all the deliverables.
- 2.3.10 Ensure all communications and deliverables carry PWGSC's Project Title and Project Number.

#### **PA 2.4 Coordination with Sub-Consultants**

The Consultant shall:

- 2.4.1 Coordinate and assume responsibility for the work of any sub-consultants and specialists retained by the lead consultant.
- 2.4.2 Ensure clear, accurate and ongoing communication of concept, budget, risk and scheduling issues (including changes) as they relate to the responsibilities of all sub-consultants throughout the duration of the contract.

#### **PA 2.5 Lines of Communication**

- 2.5.1 The PWGSC Representative is the liaison between the Consultant, PWGSC, and the Client Department and is the Consultant's prime contact for project direction, unless directed otherwise.
- 2.5.2 The Consultant shall correspond only with project team resources in the manner dictated by the PWGSC Departments Representative. The Consultant is however required to copy the PWGSC Design Advisor on all correspondence. The Consultant shall not communicate with the Client Department unless authorized in writing by the PWGSC Departmental Representative.
- 2.5.3 The Consultant shall prepare a "Lines of Communication Chart" in a graphic format.

### **PA 3.0 GENERAL ADMINISTRATION**

#### **PA 3.1 Project Team Meetings**

The Prime Consultant shall:

- 3.1.1 Arrange project team meetings throughout the project, at the request of the PWGSC Representative, on a regular basis and/or 'as required' for all members of the project team including as a minimum representatives from:

- a) PWGSC;
  - b) Client Department; and
  - c) Consultant and sub-Consultants.
- 3.1.2 Attend all meetings and presentations required for the project. Additional Consultant team members shall be required to attend project team meetings to address their particular areas of expertise during the different delivery stages for each call-up.
  - 3.1.3 Ensure all sub-consultants attend as required throughout the various phases of the project.
  - 3.1.4 Record the issues, decisions and action items (with assigned responsibility) at each meeting, and prepare and distribute meeting minutes within 48 hours of the meeting. Meeting minutes shall clearly identify the status of the project and indicate, at a minimum, any issues raised during the project that may impact the cost, risks and schedule.

### **PA 3.2 Presentations**

The Consultant shall:

- 3.2.1 Provide presentations as identified under the RS sections to support the review and approval process.
- 3.2.2 Record the issues, decisions and actions items (with responsibility) as discussed at each presentation and prepare and distribute minutes of the presentation within 48 hours. Presentation minutes must clearly identify any issues raised during the presentation that impacts cost, risk and schedule for the project.

### **PA 3.3 Response Time Requirements**

- 3.3.1 Fee proposals shall be submitted within 10 working days of initial contact meeting. The fee proposal shall include a methodology explaining the Consultants' understanding of the Required Services identified in the project Terms of Reference.
- 3.3.2 The Consultant and their sub-Consultants shall be available to attend meetings and respond to inquiries within 24 hours of PWGSC Representatives' request.

### **PA 3.4 Submissions, Reviews and Approvals**

- 3.4.1 The PWGSC Representative shall not accept documents for review that have not been reviewed and signed off by the Senior Consultant from each consulting firm assigned to the project.
- 3.4.2 PWGSC reviews are not intended to indicate complete and detailed checks of documents, and in no way relieves the Consultant(s) of their professional responsibility for reviewing their own work or that of their sub-Consultants.
- 3.4.3 The Consultant shall ensure all deliverables are submitted to the PWGSC Representative and the PWGSC Design Advisor for review. Revise as required, and

resubmit for final approval prior to presentation to the Client Department and prior to further action or implementation.

- 3.4.4 The Consultant shall ensure all CADD drawings and specifications are prepared in accordance with “Doing Business” and PWGSC National CADD Standards. The Consultant shall also ensure that all CADD drawings are consistent in sheet size.
- 3.4.5 Although acknowledging the Consultant's prerogative in design and aesthetics, the PWGSC Representative and PWGSC Design Advisor has the right to appraise all deliverables and reject work considered to be incomplete, undesirable or not in keeping with the Government of Canada Workplace Fit-up Standards.
- 3.4.6 The Consultant shall allow for the preparation of a maximum of two (2) revisions per deliverable. More than two (2) revisions may be requested at the time of call-up or throughout the duration of the project at an additional cost.
- 3.4.7 Unacceptable deliverables shall be resubmitted at no additional cost and shall not be considered as a revision.
- 3.4.8 During each submission review and approval period the Consultant shall maintain full production on the project, and shall revise documents as necessary when review comments are received.
- 3.4.9 For each call-up, work in progress may be reviewed by project team members, including, but not limited to, the PWGSC Representatives and the following:
  - a) PWGSC - Quality Monitoring Review (including, but not limited to, Accommodation Management & Workplace Solutions' Design Advisor and Interior Design National Center of Expertise, Real Property Mechanical and Electrical Center of Expertise, Fire Protection, Accessibility, etc.)
    - i. Submission Format: reports, drawings and specifications
    - ii. Submission Schedule: Submissions are reviewed at a time to be arranged. Provide 10 working day notice when work will be completed and delivered to the PWGSC Representative.
    - iii. Expected Turnaround Time: 2 weeks
  - b) Client Representative - Design Reviews and Approvals
    - i. Submission Format: reports, drawings and specifications, and oral presentations
    - ii. Submission Schedule: Submissions are reviewed at a time to be arranged. Provide 10 working day notice when work will be completed and delivered to the PWGSC Representative.
    - iii. Expected Turnaround Time: 2 weeks
  - c) Other project resources, including, but not limited to, FHBRO – review
    - i. Submission Format: drawings and specifications
    - ii. Submission Schedule: Submissions are reviewed at a time to be arranged. Provide 10 working day notice when work will be completed and delivered to the PWGSC Representative.
    - iii. Expected Turnaround Time: 2 weeks

### PA 3.5 Number of Submissions and Format Required

- 3.5.1 Unless otherwise specified by the PWGSC Representative, the Consultant shall provide the following copies for each submission, including as a minimum, summaries, reports, drawings, specifications, and/or schedules:
- a) Hard copies of all documents (**quantity and size** to be specified by Departmental Representative at time of call-up)
  - b) One (1) electronic copy on a GoC-approved external storage device (i.e. Secure USB stick) shall be provided to the PWGSC, Design Advisor. Alternative file transfer method to be discussed at call-up. The electronic format shall be native to the software that the document was created in i.e. Microsoft Word, NMS Edit, AutoCAD; and also provided in Portable Document Format (Adobe Acrobat .pdf)
  - c) The consultant is responsible to setup and manage a secure file sharing method or online portal (to be approved by PWGSC) such as Central Collab or Oproma accounts throughout the duration of the project.
  - d) For AutoCAD documents, refer to the PWGSC National CADD Standard (i.e. Pen assignments, Layer nomenclature, etc.)
- 3.5.2 The cost for hard copies shall be included in the fee proposal at time of Call-up.
- 3.5.3 The cost of the two (2) in electronic format and one (1) PDF (for each document submission) shall be included in the fee proposal at time of Call-up.
- 3.5.4 Electronic Format shall mean the most recent version of:
- a) for written reports and studies: MS Word (\*.docx)
  - b) for spreadsheets and budgets: MS Excel (\*.xlsx)
  - c) for presentations: MS PowerPoint (\*.ppt)
  - d) for drawings: AutoCAD (\*.dwg)
  - e) for specifications: Most recent version NMS Edit
- 3.5.5 The Consultant, if so requested by the PWGSC Representative, shall also submit a legible copy of all research reports, design criteria and calculations used to develop the deliverables.

### PA 4.0 DEFINITIONS

- 4.1.1 **Activity Based Working (ABW)**, is a design concept that recognizes that through the course of any day, employees engage in many different activities and that they need and can choose different types of work settings to accommodate these activities. This type of work environment is known as the activity-based workplace (ABW).
- In these workplaces individual employees are not assigned to a particular workstation. To make work effective, efficient and more enjoyable for both the organization and the employee, ABW focuses on the employees and provides the freedom to decide for themselves: how to work, where to work, which tools to use and with whom to collaborate to get the work done. The workspace is designed in such a way that it allows them to perform different activities over the course of the workday
- 4.1.2 **Activity Profiles**, or GCworkplace Activity Profiles provide three models for workpoint distributions based on different interaction profiles between employees: The **Autonomous**, **Balanced** and **Interactive** Profile. These profiles demonstrate how the GCworkplace design concept can be adapted to different work environment based on

the types of activities, typical duration and frequency, patterns of interaction within and among teams, workstyles and overall functional and technical requirements. The GCworkplace Activity Profiles also take into account varying levels of mobility, both internally and externally.

- a) The **Autonomous** activity profile supports a group that has limited task variety and low external mobility. It features the highest proportion of individual workpoints.
- b) The **Balanced** activity profile supports a group that has moderate task variety and moderate external mobility. It has the most balanced distribution of workpoints, with an equal proportion of individual and collaborative workpoints.
- c) The **Interactive** activity profile supports a group that has high task variety and high external mobility. It features the highest proportion of collaborative workpoints.

- 4.1.3 **Base Building**, normally includes the building's primary structure; the building envelope in whole or part; public circulation and fire egress (lobbies, corridors, elevators and public stairs); and primary mechanical and supply systems (electricity, heating and air conditioning, telephone, water supply, drainage, gas, etc.) up to the point of contact with individual occupant spaces. Base buildings provide serviced space for occupancy.
- 4.1.4 **Base Building Elements** include finished floors, exterior walls, interior core and demising walls, finished ceilings complete with lighting, and other building systems consistent with the general use of the building. In the case of office accommodation, for example, the base building would include exterior window coverings and primary identification signage.
- 4.1.5 **Blocking Plan**, a scaled plan in which only broad general features are indicated. The simplified plan uses blocks to represent spaces or areas and shows a relationship between the various elements of a space such as works paces, support spaces, special purpose spaces.
- 4.1.6 **Certificate of Completion (Final)**, the certificates issued by the Project Manager following the final inspection by the Project Acceptance Board. Final payment to the Contractor by PWGSC is based on the final certificates of completion.
- 4.1.7 **Certificate of Substantial Performance (Interim)**, the certificates issued by the Project Manager following the Interim Inspection. Interim payment to the Contractor by PWGSC is based on the certificates. This payment takes the place of a regular progress claim.
- 4.1.8 **Circulation**, the way people move through a building or space. Structures such as elevators, escalators, and staircases are often referred to as circulation elements, as they are positioned and designed to optimize the flow of people through a building, sometimes through the use of the building core. Primary circulation is the main circulation route connecting to the building core and common spaces, such as elevators and exit stairs. Secondary circulation includes the aisles between individual spaces, such as offices and cubicles, and support spaces.
- 4.1.9 **Collaborative spaces**, an open areas that are integrated within an office space accessible by all occupants to informally or formally interact with each other or use as a temporary workspace. The environment should be supported by WiFi and electrical to support a fully mobile working environment.
- 4.1.10 **Co-locate**, place side by side or in a particular relation.
- 4.1.11 **Consolidation**, combining a number of things or uniting people into a single more effective or coherent whole.



- 4.1.12 **Deficiency**, any item that is found at the time of inspection not to be in compliance with the approved Construction Drawings or that is not in compliance with applicable codes, standards or regulations. All costs to remedy deficiency items are the responsibility of the Contractor.
- 4.1.13 **Discrepancy**, any item that is requested by the Project Manager that has not been incorporated into the approved Construction or Furniture Installation Drawings.
- 4.1.14 **Effective Project Approval (EPA)**, is sought at the Design Development Phase and normally permits the project team to proceed through the remaining stages without interruption. Unless circumstances change markedly before the start of construction, a project with an Effective Project Approval will get built.
- 4.1.15 **External Mobility**, is the average frequency that employees in an organization perform work outside of the workplace, including telework, field work, external meetings, or the use of alternate work sites.
- 4.1.16 **Feasibility Study**, a comparison of program requirements and goals with what is physically possible, which include the analysis of building capability and spatially feasibility.
- 4.1.17 **Final Inspection**, the inspection performed by the Project Acceptance Board once project has been completed and all deficiencies identified during the Interim Inspection have been corrected.
- 4.1.18 **Fit-up**, the construction of a newly acquired space to meet the needs of the client. Includes, but not limited to, the construction, installation or alteration of partitions, finishes, fixtures, lighting, power, communications and furniture. A fit-up may include alterations or improvements to the base building or base building systems.
- 4.1.19 **Floor Plan**, a scaled drawing on a horizontal 2-D plane that articulates the relationship of spaces and areas in a building.
- 4.1.20 **Floor Plate**, the horizontal cross-section of a floor, between the floor and the next floor above, measured to the outside surface of the exterior walls and includes all mechanical equipment areas and all open areas inside a building that do not contain a floor, including atriums, elevator shafts, stairwells and similar areas.
- 4.1.21 **Focus Groups**, sessions held to establish qualitative requirements, which cannot be easily identified through a survey. Focus groups are most effective at the strategic planning level. They are used primarily to translate the Client's mission statement into organizational requirements and to assess planning options. The findings from the focus groups sessions are formalized and submitted to stakeholders.
- 4.1.22 **Full-Time Equivalent (FTE)**, a measure of labour utilization in the federal government, which approximates the actual number of persons "employed" by the government and includes indeterminate and term employees, exempt staff, appointees and Co-Op students. Contractors, consultants and temporary personnel are not considered FTEs.
- 4.1.23 **Furniture**, includes, but is not limited to, all freestanding and systems furniture components, accessories and storage required to effectively utilize the space for the intended use or purpose. All existing and new furniture shall and can be considered part of the scope of work.
- 4.1.24 **Furniture Installation Drawings**, a set of technical drawings, which contain all of the required furniture, hardware and technical data to support the reconditioning, custom cuts and installation/reconfiguration of furniture.



- 4.1.25 **Hardware**, work surface supports, fasteners, brackets, screen/panel wall-mounts, screen/panel spacers, two-, three-, and four-way connectors, screen/panel draw rod connectors, base trim kits, screen/panel-to-screen/panel connectors, screws, bolts, hinges, lock cores, lock keys, coat hooks, casters, electrical and cabling raceways, electrical harnesses, electrical outlets, voice/data outlets and modules, glides, extenders, and any other component required to reconfigure or complete the installation of the furniture.
- 4.1.26 **GCworkplace**, is a modern, efficient and inclusive workplace which responds to the public service workforce's needs and supports a flexible way of working. GCworkplace is the term adopted by the Government of Canada for workplace modernization. It is based on the implementation of Activity Based Working (ABW), which is a way of working that offers all employees shared use to a variety of workpoints, allowing them to choose the optimal setting to perform their tasks and functions. It optimizes office space and is based on the seven dimensions of creating a flexible, healthy, efficient, inclusive, collaborative, green and technologically advanced digital space.
- 4.1.27 **GCworkplace Space Planning Workbook**, is a supportive tool to the Government of Canada Workplace Fit-up Standards and the GCworkplace Design Guide. For General-Purpose Office Space, it provides an ideal workpoint distribution for each of the following Activity Profiles: Autonomous, Balanced and Interactive. This tool is used for compliance monitoring.
- 4.1.28 **GCworkplace Transformation Playbook**, is designed to help organizations pinpoint where their workplace is today in reference to where they want their workplace to be tomorrow and beyond and begin to lay out the strategic and tactical actions they can take to move their organization forward. The Playbook will help a client prepare for the future—the physical, technological, procedural, cultural and behavioral changes needed to adopt to be successful in the GCworkplace environment.
- 4.1.29 **General Administrative Offices**, accommodation of general office functions and activities that do not require special security or other special features. General administrative offices do not have high interface with the public.
- 4.1.30 **Generic or Swing Space**, is a space designed without a specific end user determined, for the purposes of temporary accommodations, such as swing space or coworking space. As functional program is not possible, planning is instead based solely on a baseline calculation done using the GCworkplace Space Planning Workbook, with the guidance provided in the GCworkplace Generic Design Application document.
- 4.1.31 **Government of Canada Workplace Fit-up Standards**, provide PSPC Real Property Services employees, and accommodations professionals in federal departments, agencies and the private sector working with PSPC on workplace design projects with direction and guidance on the fit-up of government of Canada office accommodations. The Standards apply to all office accommodation provided to government departments and agencies for which PSPC administers office space. The Standards do not apply to real property administered by Crown corporations and office space for which other departments have full custody.
- 4.1.32 **Internal Mobility**, is the average frequency that employees in an organization change between various tasks and activities throughout a typical day, and the associated patterns of movement throughout the workplace.
- 4.1.33 **Non-compliance**, client requests that would result in a fit-up of non-standard office accommodation, not including approved *Special Purpose Space*, or either higher or

lower quality or quantity than listed in the *Government of Canada Workplace Fit-up Standards*. Non-compliant items require the approval of the ADM (RPB), PWGSC. Refer to the Fit-up Standards, Non-compliance process and funding accountability.

- 4.1.34 **Project Acceptance Board**, a team assembled by the Project Manager to perform interim and final inspections of the Client Department's improvements.
- 4.1.35 **Record Drawings**, to record field deviations, dimensional data, and changes or deviations from the 'Construction Documents-Issued for Construction' indicating the work as 'actually' installed. Record Drawings are prepared based on the As-built drawings.
- 4.1.36 **Refit**, the fit-up of existing leased or Crown owned space for reuse. The scope of work may include minor refinishing, furniture relocations or additions, minor modifications to power and communication systems, or minor demolition and construction.
- 4.1.37 **Rentable Area** total usable area plus a prorated allocation of the floor and building common areas within a building. Building common include spaces such as the building lobbies, egress corridors, service spaces (mechanical/electrical, toilet, janitorial, etc), and loading docks. Excludes major vertical penetrations, such as stairwells, elevators, and major shaft spaces.
- 4.1.38 **Schematic Design**, responds to the list of programmed spaces, the qualitative goals and requirements in a graphic format. The needs and goals of the client will be re-evaluated in connection with how they best develop into real spaces. Scaled floor plan(s) include the conceptual interior arrangements such as, furnishings, and will clearly identify spaces and measurements. The drawings will indicate the general location of fenestrations (windows, doors) in addition to any big ideas the concept was based on.
- 4.1.39 **Space Equation**, preparation of a spreadsheet in a format that reflects the Client's organizational structure, functional requirements, and proposed planning solutions and is used to determine the total Usable m<sup>2</sup> required to accommodate the following:
  - a) Open and enclosed workspaces;
  - b) Support spaces;
  - c) Special Purpose Spaces;
  - d) Non-compliant spaces;
  - e) Circulation factor;
  - f) Building loss factor;
  - g) Total population;
  - h) Total space required; and
  - i) Summary by group.

The functional space equation identifies space requirements (in usable m<sup>2</sup>) by group along with a summary of the total space required for all groups.

- 4.1.40 **Space Allocation Standards Calculator** has been developed to assist in the determination of the space allocations to be applied when planning, acquiring and monitoring use of office accommodation provided by PWGSC to client departments. It exists as a tool but it is not definitive and should not replace good functional programming or the maximum space allocation as per the Space Allocation Standards.
- 4.1.41 **Space Optimization**, the most effective means for maximizing the utilization of space. There are two optimization scenarios recognized by the Government of Canada:
  - a) Space Avoidance, to accommodate more FTE's within the same space.

- b) **Densification**, to reduce the Um2 per FTE to release space and achieve savings.

4.1.42 **Space Utilization**, is the average rate at which workpoints are occupied in a typical day.

4.1.43 **Special Purpose Space (SPS)** is non-standard space required by the client department to accommodate specific activities that are unique and essential to departmental programs. These spaces are typically non-recurring and often not suitable for conversion to general administrative office.

Special purpose spaces shall include, but are not limited to:

- a) Laboratories, health units or clinics
- b) Meeting or training complexes which serve outside groups
- c) Interview rooms
- d) Inspection rooms
- e) Processing space
- f) Departmental libraries
- g) Gymnasiums
- h) Warehouses
- i) Large file or storage areas other than as allowed by the *Fit-up Standards*
- j) Trade shops
- k) Large mail rooms
- l) Computer training rooms
- m) Cash offices or similar spaces requiring special service and security features
- n) Hearing rooms

4.1.44 **Submission of Construction Documents:**

- a) 66% Submission indicates substantial development of the project including well-advanced schedules, plans, details and specifications.
- b) 99% Submission represents complete Construction Documents ready for tender call.
- c) 100% Final Submission incorporates all revisions required by the 99% review and is intended to provide the Project Manager with complete set of Construction Documents for tender call.

4.1.45 **Submission of Functional Program Document:**

- a) 66% Submission means substantial development of the subsections described in Functional Program of this Standing Offer including well advanced recommendations for accommodation standards and fit-up guidelines for the Client;
- b) 99% Submission means consolidation of all of the required subsections described in Functional Program of this Standing Offer;
- c) 100% Final Submission of Final Functional Program incorporates all revisions required by the 99% review along with the additional requirements described in: Final Functional Program Document and is intended to provide the PWGSC Representative with a complete picture of the Client's accommodation standards and fit-up guidelines.

4.1.46 **Support Space** part of a tenant's usable space to support office functions. This space does not include workspace or circulation space. Support spaces include, but not limited to, quiet rooms, meeting rooms, collaborative areas, kitchenettes, photocopy /shared equipment areas, coat closets, telecommunication rooms and undesignated support spaces assigned for storage space, interview or meeting rooms.

- 4.1.47 **Test Plan**, a scaled 2-D drawing of a full or part floor that articulates the relationship of spaces based on government standards and guidelines and other generic design requirements. This plan does not incorporate occupant or client specific requirements.
- 4.1.48 **Usable Space**, the amount of space that a tenant actually inhabits. Includes tenant workspaces, support spaces, special purpose spaces and circulation areas, but excludes building core, structural columns and tenant common spaces such as elevators, exit stairs, mechanical rooms, and core toilets. For multi-tenant floors, common building corridors are excluded from Usable Area and instead, are included in the Rental Area.
- 4.1.49 **Workpoint**, any space where an employee can perform their work, with the support of mobile technology and wireless network access. Includes both individual and collaborative settings in open or enclosed configurations to support a variety of tasks and varying degrees of interaction or concentration.
- 4.1.50 **Workshop**, people assembled to participate in a guided discussion about a particular project before it is implemented, or to provide ongoing feedback on a project specific requirements.

## REQUIRED SERVICES (RS)

1. The following general project objectives shall apply to all call-ups:
  - a. Ensure the project recommendations outlined in the Standing Offer call up supports the goals, objectives, and parameters of the project.
  - b. Ensure key initiatives outlined in the Standing Offer call up are incorporated into the project in accordance with the following principles:
    - i. Efficient and cost effective facilities that express the vision, leadership, and commitment of the government in serving the public.
    - ii. Functional spaces that enhance the esthetics, efficiency, comfort and safety of the workplace.
    - iii. Flexible spaces that can adapt to multiple uses and various tasks.
    - iv. Incorporation of current technologies (such as Wi-Fi) and innovative solutions for the total office environment while respecting the most recent *Government of Canada Workplace Fit-up Standards*; and
    - v. Incorporation of sustainable design principles, (i.e. LEED, Green Globe, WELL and /or FitWel Standards), in order to achieve an optimal balance of environmental, economic and social considerations. This means cost effective, socially and environmentally responsible design that meets the objectives and function of the intended facility or infrastructure including but not limited to minimization of energy consumption, minimization of waste from construction demolition, maximization of daylighting and maximization of the reuse and recycling of materials. It also means wellness, life cycle management, and biophilic design principles as per Accommodation Management & Workplace Solutions.
2. The requirements described in the following RS sections shall form all or part of the services and deliverables for each call-up.

3. The analysis and recommendations to be prepared and delivered by the Consultant team as identified in the following RS sections shall be developed in accordance with the principles set out in PA Reference Documents.
4. At the time of each call-up the PWGSC Representative and the PWGSC Design Advisor will elaborate on the specific objectives for individual projects.

## **RS 1.0 GENERAL CONSULTANT SERVICES**

### **RS 1.1 Verification of Project Requirements:**

- 1.1.1 As part of Fee Proposal submission, prepare a synopsis of the project specific requirements. The synopsis shall include:
  - a) Project objectives and parameters; and
  - b) Project specific information to assist in gaining a reasonable understanding of the scope of work.
- 1.1.2 Verification of project requirements at time of project start-up in a written format:
  - a) Project objectives and parameters; and
  - b) Confirms roles and responsibilities, lines of communication, and communication strategy for disseminating information;
  - c) Confirms decision-making processes within Client Department and PWGSC;
  - d) Establishes submission requirements including requirements for presentations, review and approval processes to be followed, and time frames to be adhered to;
  - e) Obtain outstanding project documents and information, i.e. organization charts, occupancy instruments, approved project plan, growth projections, etc.; and
  - f) Identify any discrepancies and/or requirements for clarification and/or direction in RS 1.0.2 a) to e) above.
- 1.1.3 Submit for review. Revise as required. Resubmit for final approval.

### **RS 1.2 Implementation Strategies**

- 1.2.1 In a report format, prepare a detailed implementation strategy for the project that documents all tasks/activities, process for information gathering, project goals, objectives and deliverables.
- 1.2.2 Without limiting the generality of the foregoing, the following documents shall be used and consulted in the development of the implementation strategy:
  - a) Information gathering strategy;
  - b) Government of Canada Workplace Fit-up Standards;
  - c) GCworkplace Design Guide;
  - d) GCworkplace Design Tool Kit: GCworkplace Space Planning Workbook, GCworkplace Best Practices Checklist;
  - e) GCworkplace Functional Programming Tools; and

f) Space Allocation Standards

1.2.3 Without limiting the generality of the foregoing, the implementation strategy shall include the following as indicated in the call-up:

- g) Move sequencing;
- h) Identification of swing space requirements;
- i) Separate section for furniture and equipment procurement strategy;
- j) Sound control requirements;
- k) Accessibility requirements;
- l) Special ergonomic requirements;
- m) Sustainability goals and strategies to be achieved based on call-up requirements, meeting minimum requirements as per Sustainable Handbook;
- n) Mechanical performance requirements;
- o) Electrical performance requirements;
- p) Structural performance requirements;
- q) IT Performance Requirements;
- r) Commissioning;
- s) Security requirements; and
- t) Additional special requirements i.e. lighting, signage

1.2.4 Identify who is responsible for each task/activity (e.g. PWGSC, Client Department, Consultant, etc.).

1.2.5 Cross-reference each task/activity with tasks/activities identified in the project schedule.

1.2.6 Submit for review. Revise as required. Resubmit for final approval.

**RS 1.3 Project Team Meetings**

1.3.1 The PWGSC Representative may arrange project team meetings as required.

1.3.2 The number and frequency of project team meetings will be determined at the time of Call-up. Reference the project Terms of Reference for specifics.

1.3.3 The Prime Consultant shall:

- a) Arrange and chair project team meetings throughout the project, at the request of the PWGSC Representative, on a regular basis and/or 'as required' for all members of the project team including as a minimum representatives from:
  - i. PWGSC;
  - ii. Client Department; and
  - iii. Consultant and sub-Consultants.
- b) Attend all meetings and presentations required for the project. Additional Consultant team members shall be required to attend project team meetings to address their particular areas of expertise during the different delivery stages for each call-up.
- c) Ensure all sub-consultants attend as required throughout the various phases of the project.

- d) Record the issues, decisions and action items (with assigned responsibility) at each meeting, and prepare and distribute meeting minutes within 48 hours of the meeting. Meeting minutes shall clearly identify the status of the project and indicate, at a minimum, any issues raised during the project that may impact the cost, risks and schedule.
- e) The Consultant shall maintain an active and current log of all key decisions throughout the project and submit on a bi-weekly basis.

#### **RS 1.4 Project Schedule**

- 1.4.1 Prepare a project schedule as per PA 1.5 Time Management Project Schedule, within one (1) week of project start up.
- 1.4.2 Submit project schedule for review in a Microsoft Project editable format. Revise as required. Resubmit for final approval.
- 1.4.3 The Prime Consultant shall:
  - a) Provide scheduling services from the beginning of the project to the end.
  - b) Prepare a project schedule that identifies in a graphic format (such as Critical Path Method (CPM), or Program Evaluation Review Technique (PERT)) all activities, timeframes (including duration, start and end dates) and milestones including critical deadlines. Time frames shall be included for submissions, reviews, revisions and approvals, as required.
  - c) Monitor the critical path and deadlines for submissions, revisions and approvals throughout the project and update on a monthly basis. Advise the PWGSC Representative of any changes that may affect schedule or budget, or are inconsistent with instructions or written approvals. Detail the extent and reasons for the changes, and obtain written approval from the PWGSC Representative before proceeding.

#### **RS 1.5 Transfer of Information**

- 1.5.1 The Consultant is required to present a formalized presentation/summary of their required services and deliverables in order to provide a historical context and a complete overview of the project parameters to the project team.
- 1.5.2 The Consultant shall provide the following deliverables, which will include as a minimum:
  - d) Proposed agenda for formal approval by the PWGSC Representative;
  - e) A written narrative/overview to identify and describe all significant factors which have influenced the decision-making process during the project; and a briefing on the last document submission;
  - f) After completion of the presentation, the written narrative/overview shall be submitted to the following:
    - i. One (1) hard copy to the PWGSC Representative;
    - ii. One (1) hard copy to the Client Department; and
    - iii. One (1) hard copy and one (1) electronic non-PDF copy to the PWGSC Design Advisor.



## **RS 2.0 FUNCTIONAL PROGRAM**

The purpose of RS 2.0: Functional Program is to ensure the Consultant has gathered sufficient information to analyze the Client Department's functional and operational requirements, developed an understanding of the building(s') infrastructure and apply the most recent *Government of Canada Workplace Fit-up Standards*. All of this information will be incorporated into the Functional Program Document.

The Functional Program is a document prepared prior to a workplace fit-up project which outlines in detail the functional and technical requirements of the workspace so that it may be designed to meet the specific needs and work styles of those who will be occupying the space. The Functional Program Report is the culmination of the results of a design consultation process, and may also include other client-specific information that would inform the design process, such as more detailed Special Purpose Space specifications, departmental planning guidelines or security briefs. The importance of following a rigorous design consultation process cannot be understated, as user requirements and activities form the basis of each GCworkplace design. For this reason, all functional programming activities must include the three-phased consultation approach outlined below and available through the GCworkplace Interior Design Resource website (as listed in PA 1.8) under the "Pre-design" section (GCworkplace Functional Programming 101):

PHASE 1: ESTABLISH A VISION

PHASE 2: SURVEY POPULATION

PHASE 3: GATHER PROGRAM-SPECIFIC REQUIREMENTS

### **RS 2.1 Verification of Existing Functional Program**

- 2.1.1 Review, update and/or complete Functional Program Document prepared by others. Refer to RS 2 Functional Program for list of services and deliverables.
- 2.1.2 Ensure content of Functional Program Document prepared by others includes deliverables described in RS 2 and RS 3 of this Standing Offer and that the deliverables are complete and still current, i.e. up-to-date and approved by PWGSC and the Client Department.
- 2.1.3 Prepare a gap analysis in graphic format using the most recent Government of Canada Workplace Fit-up Standards and the most recent Space Allocation Standards. Gap analysis must identify all items which exceed or do not meet the minimum requirements of the standards.
- 2.1.4 Update the functional program deliverables as required. Submit for review. Revise as required. Resubmit for final approval.

### **RS 2.2 Space Occupancy and Utilization Assessment**

- 2.2.1 Prepare a Space Occupancy and Utilization Assessment including data collection and analysis of trends and key findings
- 2.2.2 Capture building level occupancy data defined as the total quantity of people present in the selected office accommodation. The Space Occupancy and Utilization Assessment should capture the following information:



- a) How many people enter the government office spaces on a daily basis.
- b) How many people are in the building at specific time intervals throughout the day.

2.2.3 Capture occupancy data at the work point level to assess efficiency and utilization of space pre and post fit-up. The assessment is to include all areas in the workplace, comprising of individual work-points, collaborative areas and support spaces. The desire is to monitor these spaces for frequency of use, number of users and type of activities conducted.

2.2.4 Building common areas are to be excluded.

### **RS 2.3 Information Gathering**

2.3.1 All functional programming activities must include the three-phased consultation approach outlined in RS 2.0 above.

2.3.2 In preparing a functional program, it is key to understand the GCworkplace Activity profiles (Refer to PA 4.1.2 definition above).

2.3.3 User-Centered Design Strategy

- a) User centred design puts a greater emphasis on the functional needs and work styles of workplace occupants to create an environment that caters to their unique activities and business processes, offers individual choice and flexibility, and empowers a more autonomous way of working whereby employees have greater control of the factors and settings that most contribute to their individual and group productivity. This means it is essential to engage with end users to inform the design solution.
- b) The optimal GCworkplace planning approach adopts an Activity-Based Working strategy, which allows maximum flexibility while reducing vacancy and underutilized space. Reference the GCworkplace Design Guide for application of the design principles.

2.3.4 Mobility Assessment.

- a) An important part of the consultation regarding activity profiles should include a discussion of internal and external mobility. Internal mobility, which is, moving between multiple activities and workpoints within the workplace frequently throughout the day, will determine whether a design solution should lean more towards an Autonomous or Interactive profile. However, external mobility, referring to activities being performed outside of the primary workplace (whether telework, field work, external meetings, or through the use of coworking or alternate work sites) may also affect the recommended activity profile for the primary workplace design by altering the type of workpoints required. It is therefore essential to determine mobility level, and what types of activities are being performed within or outside the workplace, in order to determine the optimal planning approach.

2.3.5 In preparing a functional program, the Consultant's main task is to examine the client's functional requirements in detail so as to define the clients' needs and objectives. These requirements will establish criteria for evaluating potential design solutions and other strategic alternatives.

The consultant must understand:

- a) The impact of a building's occupants and processes (facilities) on the built environment;
  - b) The social and environmental impacts of the building's program on the community; and
  - c) The planning impacts of its function on the local infrastructure.
- 2.3.6 To prepare a functional program, Consultants shall identify, research, and observe the Users of the proposed building (facility) and their work activities, including:
- a) Research and information gathering through information sessions with employees, focus group sessions, etc.;
  - b) Function-by-function, room-by-room, or branch by branch activity plans;
  - c) Staffing plans (current/future);
  - d) Open vs. enclosed workspaces;
  - e) Special purpose space;
  - f) Support space;
  - g) Storage requirements;
  - h) The volume of activity planned for specific facility components, such as:
    - i. Throughput (amount of material put through experimentation, analysis);
    - ii. Flow patterns (proximity /circulation).
- 2.3.7 The Consultant shall then develop approximate floor areas and technical requirements for the proposed facility, including:
- a) Details of the space, facility, or of the workstation;
  - b) Special facility equipment or furniture configurations;
  - c) Environmental criteria
  - d) Must be based on the most recent Government of Canada Workplace Fit-up Standards.
- 2.3.8 The Consultant shall also advise the client on alternatives, such as the architectural and financial implications of various building options. Functional programs for buildings (facilities) are future oriented - alternative scenarios may be based on high-, medium-, and low-growth projections, or on fast, medium or slow roll-outs of anticipated events. The consultant shall assist the client in assessing the advantages or benefits - and the disadvantages or costs - of each alternative.

## **RS 2.4 Format of Functional Program Document**

- 2.4.1 Develop the format for the Functional Program Document and draft 'Table of Contents' based on RS 2.0 above (FINAL REPORT). Submission should also include as a minimum the formatting for spreadsheets, cost estimates, reports and room data sheets.
- 2.4.2 Room data sheets shall include the following as a minimum:
- a) General requirements: description, size, location, special requirements;
  - b) Architectural requirements: walls, floor, ceiling, doors, windows, millwork specialties, signage;
  - c) Furniture requirements / recommendations
  - d) Mechanical requirements;

- e) Electrical requirements: power, lighting;
- f) Audio-Visual;
- g) Acoustical;
- h) Communication requirements; and
- i) Security requirements.

2.4.3 Submit for review. Revise as required. Resubmit for final approval.

## **RS 2.5 Proximity Recommendations**

- 2.5.1 Document the Client Department's current and future proximity requirements, support spaces and special purpose spaces. Examine the effect these may have on other functional requirements and make recommendations.
- 2.5.2 Proximity/Zoning depends on whether or not the client wishes to have assigned neighbourhoods or floors to certain branches/divisions/groups while at the same time having workpoints being unassigned within the neighbourhoods.
- 2.5.3 Stacking Diagrams may be required depending on how the client wants to organize their space. Stacking Diagrams will more than likely come into play with larger multi-floor projects. To be determined at Call-up.
- 2.5.4 Submit as part of 66% and 99% review of Functional Program Document.

## **RS 2.6 Security Recommendations**

- 2.6.1 Obtain the approved client department's security requirements (security design brief / threat risk assessment) from the Departmental Security Officer (DSO).
- 2.6.2 Review the approved security documents and identify the effects these may have on the client's functional requirements.
- 2.6.3 Recommend any necessary modifications to the base building. Assess the impact of these modifications on overall space, time and budget.
- 2.6.4 Make specific and detailed recommendations based on additional client requirements, i.e. TRA or operational needs approved by Departmental Security Officer. Prepare a detailed list justifying the recommendations.
- 2.6.5 Coordinate work performed by Mechanical and Electrical Engineering sub-consultants and incorporate into Security Recommendations.
- 2.6.6 Submit as part of 66% and 99% review of Functional Program Document.

## **RS 2.7 Communications/Data Recommendations**

- 2.7.1 Coordinate with the Shared Services Canada (or other Client Departmental IT department) to gather communication/data requirement.

- 2.7.2 Prepare documentation to identify the Client Department's current and future communications/data requirements (e.g.. Wireless, notebook, VOIP, telepresence) and the effect these may have on other functional requirements and proposed planning alternatives. Report to be in accordance with the most recent *Government of Canada Workplace Fit-up Standards*.
- 2.7.3 Include the communications/data information on the Room Data Sheets.
- 2.7.4 Prepare recommendations and all necessary modifications to the base building. Assess the impact of those modifications on overall space, time and budget.
- 2.7.5 Coordinate work performed by Mechanical and Electrical Engineering sub-consultants and incorporate into the Communications/Data Recommendations Report.
- 2.7.6 Submit as part of 66% and 99% review of Functional Program Document.

## **RS 2.8 Preliminary Building Capability Recommendations**

- 2.8.1 The intent of the Building Capability Recommendations is to investigate, analyze and assess how well the building(s) meets Client Department requirements, and make recommendations to suit. This documentation should not be confused with a Building Condition Report (BCR) which identifies the capital improvement requirements necessary to maintain an asset at a specified level, throughout and at the end of a set planning horizon.
- 2.8.2 The Consultant shall assess the capability of the existing building infrastructure and systems including as a minimum architectural, interior design, mechanical, electrical, structural, conveying system, communication/data, and security, to determine how effectively the building(s) meets Client Department requirements.
- 2.8.3 Prepare the Preliminary Building Capability Recommendations in reference to the Client Department's functional requirements and PWGSC's documents. The document shall include but is not limited to:
  - a) Results of site investigations and comprehensive review of the project requirements;
  - b) Location and capability of existing infrastructure and building systems including architectural/interior design, mechanical, electrical, structural, conveying system, communications/data and security systems;
  - c) Deferred maintenance; curable/incurable equipment obsolescence; design problems and deficiencies that are likely to affect the Client Department requirements;
  - d) Identification of all deficiencies, potentials and constraints with the existing building systems to support the Client Department's functional requirements and proposed planning alternatives;
  - e) Areas of concern including an assessment of their impact on space, time and budget;
  - f) Preliminary recommendations and alternative remedial measures for areas of concern;
  - g) Preliminary assessment of the buildings conformance with the PWGSC Sustainable Development Strategy; and

- h) In buildings or floor spaces where existing construction and or fit-up exist and are to be reused, assess building conformance with the most recent Government of Canada Workplace Fit-up Standards.
- 2.8.4 Coordinate work performed by Mechanical and Electrical Engineering sub-consultants and incorporate into Functional Program Document (99%) and Preliminary Building Capability Recommendations. Mechanical and Electrical Engineering services must be complete in that they identify all issues that will have a significant impact on the project.
- 2.8.5 Submit as part of 66% and 99% review of Functional Program Document.

## **RS 2.9 Existing Building Finishes**

- 2.9.1 In cases where the Functional Program is being undertaken with the intent to re-use the existing space(s), prepare a detailed list of finishes both in report and drawing formats, including drawings, list of components, description of item, building finish and colour, and an assessment of the condition that are in a satisfactory condition and could be reused. Prepare a list of items including but not limited to:
  - a) Ceilings;
  - b) Lighting fixtures (accent and base building);
  - c) Flooring;
  - d) Hardware;
  - e) Plumbing fixtures;
  - f) Doors (frames, glazing, sidelight, etc.);
  - g) Millwork and built-in furniture; and
  - h) Partitions (fixed, glazed, demountable, mobile, etc.)
  - i) Base Buildings elements
  - j) Heritage elements
- 2.9.2 Submit as part of 66% and 99% review of Functional Program Document.

## **RS 2.10 Preliminary Sustainability Recommendations**

- 2.10.1 Preliminary Sustainability Recommendations to include but not limited to the following:
  - a) Refer to PA1.7
  - b) Recommendations for sustainable sound construction materials (renewable, recycled content, durable materials);
  - c) Energy and water efficiency in facilities (including heating, ventilation, lighting, low water consumption appliances, etc.);and
  - d) Complete sustainability checklist using either Green Globe Fit up or LEED Silver Commercial Interiors tool. The checklist should include the projected Sustainability Goal intended to be achieved and the rationale for including and excluding specific elements on the checklist.
- 2.10.2 Coordinate work performed by Mechanical and Electrical Engineering sub-consultants and incorporate into Preliminary Sustainability Recommendations.
- 2.10.3 Submit as part of 66% and 99% review of Functional Program Document.

## **RS 2.11 Furniture Recommendations**

- 2.11.1 Gather, analyze and document the Client Department's furniture and workstations requirements in a written and graphic format (i.e. room data sheet) including all workstation and work settings type and finishes, i.e. systems furniture, freestanding, soft seating, case goods etc.;
- 2.11.2 Refer to available product lists on current Supply Arrangement CPI's;
- 2.11.3 Make recommendations for the development of workstations standards in accordance with the most recent Government of Canada Workplace Fit-up Standards & sustainability requirements and provide the following:
  - a) Recommendations based on the Client Department functional requirements for layouts for each category of furniture required (including as a minimum furniture type, layout, dimensions and power requirements);
  - b) A comparative (i.e. quantitative and qualitative) analysis between existing furniture, workstations, work settings in sufficient detail to facilitate selection by the Client Department;
  - c) A maximum of three (3) layouts for each category of workstation required;
- 2.11.4 Submit as part of 66% and 99% review of Functional Program Document.
- 2.11.5 Submit for review. Revise as required. Resubmit for final approval.

#### **RS 2.12 GCworkplace Workpoints – Individual and Collaborative Recommendations**

- 2.12.1 Gather, analyse and document the Client Department's individual and shared workpoints requirements in a written and graphic format (i.e. room data sheet) including, but not limited to, all workstation types and finishes, i.e. systems furniture, freestanding, soft seating, case goods, millwork, electrical, telephone and data requirements.
- 2.12.2 Make recommendations for innovative support space in accordance with the most recent Government of Canada Workplace Fit-up Standards & sustainability requirements and provide the following:
  - a) Identification of opportunities for space consolidation;
  - b) A document indicating the effects of each proposed option based on the Client Department mission statement, functional requirements, space allocation, and project budget. Provide written justification and rationale for each of the planning alternatives;
  - c) Requirements for off-site support spaces, if applicable, shall also be included and clearly noted as such; and
  - d) A maximum of three (3) layouts for each category of support space required;
- 2.12.3 Submit as part of 66% and 99% review of Functional Program Document.
- 2.12.4 Submit for review. Revise as required. Resubmit for final approval.

#### **RS 2.13 Special Purpose Space Recommendations**

- 2.13.1 Gather, analyse and document the Client Department's special purpose space requirements in a written and graphic format (i.e. room data sheet) including, but not limited to, all work points types and finishes (i.e. systems furniture, freestanding, soft seating and case goods), electrical, mechanical, telephone and data requirements.
- 2.13.2 Make recommendations based the most recent Government of Canada Workplace Fit-up Standards and the Client Department's functional requirements, for layouts for each of the special purpose spaces, including but not limited to furniture type, layout, and mechanical and electrical requirements;
- 2.13.3 A comparative (i.e. quantitative and qualitative) analysis between existing special purpose spaces and each of the proposed special purpose spaces in sufficient detail to facilitate selection by the Client Department;
  - a) Identify options for space optimization, and use of multipurpose spaces, etc.;
  - b) Identify requirements for off-site special purpose spaces, if applicable, shall also be included and clearly noted as such;
  - c) Prepare a workflow diagram;
- 2.13.4 A document indicating the effects of each of the proposed special purpose space planning alternatives, based on the Client Department mission statement, functional requirements, space allocation, and project budget. Provide written justification and rational for each of the planning alternatives.
- 2.13.5 Submit as part of 66% and 99% review of Functional Program Document.
- 2.13.6 Submit for review. Revise as required. Resubmit for final approval.

#### **RS 2.14 Inventory and Assessment of Existing Furniture Report**

- 2.14.1 Prepare a detailed furniture inventory report including drawings of existing furniture layouts for the following areas:
  - a) Open and enclosed workpoints;
  - b) Open and enclosed Support spaces;
  - c) Special purpose space; and
  - d) Collaborative space.
- 2.14.2 Work performed will produce a comprehensive inventory, analysis of the existing furniture and the description of the condition in a chart format.
- 2.14.3 Format of chart is to be approved by PWGSC Representative.
- 2.14.4 The report shall include identification of existing locations, photographs and an audit of all furniture and furniture components including a chart indicating counts. The audit shall include data sheets that verify the following (details to be identified at call-up):
  - a) Panel: Manufacturer, model, type, dimensions (height, width & depth), colour(s), finish(s), powered or non-powered, condition and recommendation;



- b) Power components: Manufacturer, model, type, length, colour(s), finish(s), condition and recommendation;
  - c) Surface (freestanding or panel hung): Manufacturer, type, dimensions, colour(s), finish(s), condition and recommendation;
  - d) Storage: Manufacturer, model, type, dimensions, colour(s), finish(s), condition and recommendation;
  - e) Accessories: Manufacturer, model, type, dimensions, colour(s), finish(s), condition and recommendation;
  - f) Seating: Manufacturer, model, type, dimensions, colour(s), finish(s), condition and recommendation; and
  - g) Custom furniture: Manufacturer, model, type, dimensions, colour(s), finish(s), condition and recommendation.
- 2.14.5 Assess the viability to re-use furniture in compliance with the latest Government of Canada Workplace Fit-up Standards and provide recommendations.
- 2.14.6 Submit for review. Revise as required. Resubmit for final approval.

## **RS 2.15 Preliminary Procurement Strategy for Furniture**

- 2.15.1 Based on the parameters developed in conjunction with the PWGSC Representative and Client Department, examine the procurement strategies for furniture and assess their impact on the Client Department's functional requirements and proposed planning alternatives.
- 2.15.2 Include an examination and analysis based on the Policy on Green Procurement, the most recent Government of Canada Workplace Fit-up Standards; and of the following
- 2.15.3 Reuse/refurbishment of existing furniture versus procuring new furniture;
- a) Procurement process, including time frames, for the purchase of new furniture, and the reuse/refurbishment of existing furniture based on the Policy on Green Procurement; and
  - b) New furniture requirements, at a macro level for budget purposes.
- 2.15.4 Prepare a furniture Class 'D' cost estimate that compares the reuse/refurbishment of existing furniture with the purchase of new furniture. The Class 'D' estimate is to indicate cost breakdown between PWGSC and Client Department cost, as per the most recent Government of Canada Workplace Fit-up Standards.
- 2.15.5 Make specific and detailed recommendations in a written format and graphic layout. Identify positive and negative impacts on overall space, time, budget and quality. Include functional justification and rationale.
- 2.15.6 Submit as part of 66% and 99% review of the Functional Program Document.

## **RS 2.16 Proposed versus Final Procurement Strategy for Furniture**



- 2.16.1 Further to Preliminary Procurement Strategy for Furniture, confirm the processes to be used to procure new furniture and/or refurbish existing furniture including budget and time frames required.
- 2.16.2 Submit as part of 66% and 99% review of the Functional Program Document.

#### **RS 2.17 Planning Alternatives**

- 2.17.1 Based on the most recent Government of Canada Workplace Fit-up Standards, develop and describe, in a written and graphic format at the macro level, two (2) planning alternatives complete with a general description of how the standards are applied and a 'general look and feel' (at a preliminary level) of the spaces, including Special Purpose Space.
- 2.17.2 Submit as part of 66% and 99% review of Functional Program Document.
- 2.17.3 Submit for review. Revise as required. Resubmit for final approval.

#### **RS 2.18 Functional Space Equation**

- 2.18.1 Prepare a detailed functional space equation using the latest space planning tool provided by PWGSC (such as the Space Planning Workbook). The functional space equation shall identify space requirements (in m<sup>2</sup>) by division along with summary of the total space required for all groups for the following current and future requirements:
  - a) Approved staff listings including as a minimum all full time and part time employees' positions and levels, consultants, students, teleworkers. List by person, group, section, division, worker profile etc.;
  - b) Open and enclosed workpoints;
  - c) Open and enclosed Support spaces;
  - d) Collaborative space;
  - e) Special purpose space;
  - f) Circulation factor;
  - g) Building loss factor;
  - h) Total population; and
  - i) Total space required; and
  - j) Summary by group and Department; and
  - k) Non-compliant versus compliant spaces.
- 2.18.2 Identify requirements for off-site special purpose spaces, if applicable, shall also be included and clearly noted as such.
- 2.18.3 Submit as part of 66% and 99% review of Functional Program Document.
- 2.18.4 Submit for review. Revise as required. Resubmit for final approval.

#### **RS 2.19 Gap Analysis**

- 2.19.1 Prepare a gap analysis in graphic format using the most recent Government of Canada Workplace Fit-up Standards and the most recent Space Allocation Standards. Gap analysis must identify all items which exceed or do not meet the minimum requirements of the standards based on the GCworkplace Space Planning Workbook.
- 2.19.2 Identify, highlight and clarify all additional costs, which are outside the most recent Government of Canada Workplace Fit-up Standards. In the gap analysis outline who is responsible for the additional costs.
- 2.19.3 Consultant is to document all non-compliant items from the GCworkplace Design Guide. Non-compliance items are items that either exceed or under accommodate/fall short of meeting the latest Government of Canada Workplace Fit-up Standards.
- 2.19.4 Submit as part of 66% and 99% review of Functional Program Document.
- 2.19.5 Submit for review. Revise as required. Resubmit for final approval.

#### **RS 2.20 Class 'D' Estimate**

- 2.20.1 Prepare a Class 'D' estimate (Elemental Cost Analysis). Estimate shall be summarized in an agreed and consistent elemental format, by discussion with the PWGSC Representative.
- 2.20.2 Cost estimate is to include as a minimum architectural, interior design (including furniture), mechanical and electrical. Class 'D' estimate is to isolate and show separately the cost of base building costs, fit-up costs and Client Department costs (refer to the funding accountabilities identified in the most recent Government of Canada Workplace Fit-up Standards).
- 2.20.3 Submit as part of 66% and 99% review of Functional Program Document.
- 2.20.4 Submit for review. Revise as required. Resubmit for final approval.

#### **RS 2.21 Functional Program Document (66% and 99%)**

- 2.21.1 Consolidate all functional requirements information, including sub-consultant work into the Functional Program Document (66% and 99%) as per the approved format. The Functional Program Document at this phase consists of the consolidated 66% and 99% submissions.
- 2.21.2 Identify key issues to be examined and further developed in the next phase of the project.
- 2.21.3 Submit as part of 66% and 99% review of Functional Program Document.
- 2.21.4 Submit for review. Revise as required. Resubmit for final approval.
- 2.21.5 Prior to proceeding to the Design Concept, it is the Consultant's responsibility to ensure that all requirements, which are not part of the most recent Government of Canada

Workplace Fit-up Standards, have been clearly identified. Consultant must obtain PWGSC Representative's approval before beginning RS 3 Design Concept.

### **RS 3.0 DESIGN CONCEPT**

The purpose of RS 3: Design Concept is to further develop and refine the Client Department's functional requirements and RS 2: Functional Program by developing design concept plans, vertical stacking and horizontal zoning plans along with final building capability report. This information will be incorporated into the Final Functional Program Document and then used to assess project viability and, where applicable, guide future project delivery.

#### **RS 3.1 Design Concept Plans**

- 3.1.1 Based on the most recent Government of Canada Workplace Fit-up Standards, prepare a maximum of two (2) design concept plans of one floor (or portion, depending on the size of the floor plate).
- 3.1.2 At the time of call up, it shall be determined whether the design concept plans shall reflect the approved Client Department's overall functional requirements or a generic approach.
- 3.1.3 The design concept plans shall contain sufficient detail (including furniture, workstations etc.) to graphically illustrate the most recent Government of Canada Workplace Fit-up Standards and the functional program requirements established in RS 2: Functional Program.

The following shall be included:

- a) Identification of all partition including door swings;
  - b) All circulation paths;
  - c) Proposed workstation layouts for both enclosed offices and open areas;
  - d) Support space for both enclosed areas and open areas;
  - e) Special purpose spaces as required to illustrate the overall design strategy;
  - f) Building loss factor;
  - g) Collaboration spaces; and
  - h) Identification of all areas including name, room numbers and size.
- 3.1.4 Provide a written summary adjacent to each option including as a minimum: number and types of open and enclosed workpoints – collaborative and individual, total number of end users, types and number of support spaces, types of special purpose spaces, percentage of circulation, and percentage of building loss factor. Additional information could be required at time of call up.
  - 3.1.5 The design concept plans shall respect the maximum allocation as per the Space Allocation Standards, reflect the approved 99% functional requirements and project budget.
  - 3.1.6 The plans shall be consistent with the building's configuration and systems including as a minimum: mechanical, electrical, structural, communications/data, security.

- 3.1.7 Submit design concept plans for review. Revise as required. Resubmit for final approval pending review and approval by authorities having jurisdiction.
- 3.1.8 The approved design concept plan shall be included in the Final Functional Program Document.

### **RS 3.2 Master Drawings**

- 3.2.1 Verify on-site conditions by preparing master drawings to scale and in an approved AutoCAD format as per “Doing Business” and the PWGSC National CADD Standard.
- 3.2.2 At a minimum, and determined at time of call-up, locate existing architectural/interior design, mechanical, electrical, structural, and communication/data elements on underside of suspended ceilings and verify they are correctly indicated. Updating (as opposed to “preparing”) master drawings will be an additional service and part of the “Additional Services” section RS 9.0 of this document.
- 3.2.3 Submit for review. Revise as required. Resubmit for final approval.

### **RS 3.3 Vertical Stacking Diagrams**

- 3.3.1 Prepare vertical stacking diagrams for each building based on the Client Department's approved functional program, proximity requirements, and space equation.
- 3.3.2 Number of diagrams and options to be identified at time of call-up.
- 3.3.3 Submit for review. Revise as required. Resubmit for final approval.
- 3.3.4 The approved vertical stacking diagrams shall be included in the Final Functional Program Document.

### **RS 3.4 Horizontal Blocking Plans**

- 3.4.1 Horizontal blocking plans should be prepared as per the three (3) functional zones identified in the GCworkplace Design Guide.
  - a) A **Quiet Zone** includes open, semi-enclosed, and enclosed individual workpoints. In these zones, the intent is to encourage individual focus work, and to support the need for quiet or private spaces;
  - b) A **Transitional Zone** includes a variety of open and enclosed spaces where less intense concentration is supported. It may include open individual and group workpoints, semi-enclosed collaboration, and support spaces such as lockers or shared equipment areas; and
  - c) In an **Interactive Zone**, socialization and group collaboration is promoted and strongly encouraged. Providing a variety of group workpoints, and locating these activities away from the Quiet Zones, it is possible to achieve a balance within the workplace which supports all types of work activities and work styles.

- 3.4.2 Prepare horizontal blocking plans per floor based on the Client Department's approved functional program, and vertical stacking.
- 3.4.3 Number of plans to be identified at time of call-up.
- 3.4.4 Include identification of all areas and location of all main circulation aisles, designation (in m<sup>2</sup>) and type of workpoints, designation (in m<sup>2</sup>) for support spaces and special purpose spaces. Units, divisions, "neighbourhoods", etc. shall also be identified. Consultant to also provide a count of number of users per "neighbourhoods" and per floor.
- 3.4.5 Submit for review. Revise as required. Resubmit for final approval.
- 3.4.6 The approved horizontal blocking plans shall be included in the Final Functional Program Document.

### **RS 3.5 Related Public Spaces**

- 3.5.1 Provide Functional Program and Design Concept services described in the Required Services (RS) section of this document that are applicable to upgrading the base building outside the office space described in the Call-up. These related public spaces might include, as a minimum, lobbies, washrooms, and/or elevator cabs. This does not include areas within the office fit-up space where higher interaction with the general public might occur (i.e. reception area, service counter). However, universal washrooms could be located within the office fit-up space and would need to be properly assessed and captured.
- 3.5.2 Confirm project budget related to the fit-up of related public spaces and provide justification regarding functional and technical requirements along with Class 'D' and Class 'C' estimates.
- 3.5.3 Submit for review. Revise as required. Resubmit for final approval.

### **RS 3.6 Presentation Boards**

- 3.6.1 Prepare the approved vertical stacking diagrams, horizontal blocking plans, design concept plans, and/or final furniture plans for presentation purposes.
- 3.6.2 The presentation technique selected by the Consultant shall clearly communicate both the functional and aesthetic aspects of the proposed fit-up developed for the Client Department. All presentation boards shall be completed at an appropriate scale, mounted on boards, and colour rendered. Elevation and perspective views, as required, shall include human figures for scale. A digital version is also required in a shareable format.
- 3.6.3 Present the material to the PWGSC Representative, PWGSC Design Advisor and the Client Department.
- 3.6.4 Submit comments from presentation(s), if any, in the form of meeting minutes.

3.6.5 Revise the presentation material as required. Resubmit for final approval.

### **RS 3.7 Colour Boards**

3.7.1 Develop two (2) colour schemes on illustration boards that further refine the 'general look and feel' described in the RS 2: Functional Program, and clearly demonstrate the intended use of materials including as a minimum architectural finishes, and finishes for furniture and furnishings. A physical and/or a digital version in a sharable format will be identified at call-up.

3.7.2 In a written format, identify the colour, pattern, texture, name, manufacturer and reference number for each finish and colour identified.

3.7.3 Submit colour schemes and finishes identification for review. Revise as required.

### **RS 3.8 Presentation to Upper Management**

3.8.1 Prepare and conduct a presentation to upper management of the Client Department, to achieve an executive level understanding of the project, to present progress status reports, obtain feedback, and/or seek approval.

3.8.2 Submit the findings from the presentation in the form of meeting minutes. Revise as required. Resubmit.

### **RS 3.9 Employee Information Session(s)**

3.9.1 Prepare and conduct an information session(s) for employees of the Client Department to explain the following:

- a) Goals and objectives of the project;
- b) Stakeholder involvement (including roles and responsibilities);
- c) Communication strategy for disseminating project information; and/or
- d) Project schedule.

3.9.2 Submit findings from the employee information session in the form of meeting minutes. Revise as required. Resubmit.

### **RS 3.10 Vision Sessions**

3.10.1 Prepare, coordinate and conduct vision sessions to established workplace strategies with participants chosen by the Client Department, to assist in the information gathering process, and/or to assess the viability of proposed planning alternatives

3.10.2 Submit findings from the vision session in the form of a Power Point presentation. Revise as required. Resubmit.

### **RS 3.11 Mechanical and Electrical Engineering**

- 3.11.1 Prepare Mechanical and Electrical Engineering design concept documents in sufficient detail to illustrate the Mechanical and Electrical Engineering design concept and to demonstrate compliance with the project requirements. Develop design concept solutions that accommodate the Client Department's requirements; respond to the existing building, its surrounding context and the project budget. Provide option analysis complete with life cycle cost analysis.
- 3.11.2 Gather relevant M&E information to be included into Room Data Sheets as per project specific requirements.
- 3.11.3 Submit the in progress M&E concept work as required and when requested by the Departmental Representative for review and approval.
- 3.11.4 Respond in writing to any and all comments or feedback given, and address each item to the satisfaction of the Departmental Representative.
- 3.11.5 Resubmit reviewed work as many times as is required to address any noted deficiencies as deemed required by the Departmental Representative.
- 3.11.6 Do not proceed forward with any work under review until given written approval by the Departmental Representative.
- 3.11.7 Number of options to be identified at time of call-up.
- 3.11.8 Design Concept and alternative solutions shall adhere to the most recent Government of Canada Workplace Fit-up Standards.
- 3.11.9 Submit for review. Revise as required. Resubmit for final approval.
- 3.11.10 Overview: The Consultant is to provide a detailed report that
  - a) Describes the existing conditions;
  - b) Describes the required conditions that satisfy the project's objectives; and
  - c) Present unique options for achieving these required conditions as per 3.11.7.
- 3.11.11 Scope and Activities
  - a) Review all available existing material related to the building/site;
  - b) Visit the building/site, investigate and analyze the existing equipment/systems;
  - c) Interview building/site operators and occupants;
  - d) Have any required mechanical or electrical tests conducted;
  - e) Determine the state of the existing equipment/systems, including the functionality, capacity, reliability, condition, safety, adherence to applicable codes, standards, etc.;
  - f) Identify and verify all authorities having jurisdiction over the equipment/systems;
  - g) Identify the discipline services that will be required during the project delivery stages such as civil and architectural;
  - h) Analyze the project requirements and objectives;
  - i) Determine the conditions that fully satisfy all of the project's requirements and objectives;

- j) Create a minimum of three (3) detailed options on how to move the existing equipment/systems from the existing state to the required end state;
- k) For each option determine the benefits, detriments, risks, implementation strategies, costs (class D estimate), schedules, energy and water consumption information, operational and maintenance cost impacts, etc.;
- l) Create simple schematics for each option; and
- m) Identify the preferred option, along with a detailed explanation as to why it is being recommended.

#### 3.11.12 Deliverables

A detailed report that includes:

- a) An overview of the project;
- b) Information on the state of the existing equipment/systems, including locations, materials, deficiencies (as related to functionality, capacity, reliability, condition, safety, adherence to applicable codes, standards, etc.) life expectancy, life safety aspects, etc.;
- c) The desired end state for the equipment/systems that satisfies all of the project requirements;
- d) A minimum of 3 detailed options that describe how to bring the existing equipment/systems to the desired end state, that includes for each option advantages and disadvantages, implementation strategies, costs (class D estimate), schedules, simple schematics, energy and water consumption information, operational and maintenance cost impacts, etc.; and
- e) Identification of the preferred option, along with a detailed explanation as to why it is being recommended.

#### 3.11.13 Other Information And Requirements

As a minimum the report shall consist of the following sections:

- a) Executive Summary;
- b) Introduction;
- c) Existing Conditions;
- d) Analysis;
- e) Options; and
- f) Recommendations

### **RS 3.12 Furniture Procurement Report**

#### 3.12.1 Procurement of Furniture through Public Tender

- g) Work closely with PWGSC Design Advisor and Furniture Specialist team members within Accommodation Management & Workplace Solutions in order to establish lines of communications and latest procurement methodologies prior to submitting a report.
- h) Develop a detailed furniture specification(s) that can be used to procure new furniture and/or refurbish existing furniture through the public tender process.
- i) Submit for review. Revise as required. Resubmit for final approval.



### 3.12.2 Procurement of Furniture through PWGSC Standing Offers, Supply Arrangements and other Internal Processes

- j) Furniture requirements described in this section shall be used to select a Furniture Manufacturer/Supplier for the project through the standing offer process or other government internal procurement methods.
- k) The final approved furniture requirements shall be included in the Final Functional Program Document (see RS 3.17: Final Functional Program Document).

### 3.12.3 Procurement of Refurbished Existing Furniture

- l) Provide a detailed inventory of existing furniture to be refurbished through the standing offer process including as a minimum the following:
  - i. Identification of furniture by manufacturer and type (e.g. work surfaces, desks, chairs, file cabinets etc.);
  - ii. Total number of units;
  - iii. Existing/new finishes; existing/new location; and
  - iv. Associated budget information.
- m) Submit for review. Revise as required. Resubmit for final approval.

### 3.12.4 Identifying Freestanding Furniture Requirements

- n) Provide generic requirements for new freestanding furniture to be procured through standing offers, supply arrangements or other government internal procurement methods including as a minimum the following:
  - i. Identification of furniture by type (i.e. single pedestal desk, credenzas, files, chairs, etc.);
  - ii. Dimensions;
  - iii. Total number of units;
  - iv. Typical layouts if applicable;
  - v. Technical requirements if applicable;
  - vi. Finishes; and
  - vii. Associated unit price ranges and budget information.
- o) Submit for review. Revise as required. Resubmit for final approval.

### 3.12.5 Identifying Systems Furniture Requirements

- p) Provide generic requirements for new systems furniture to be procured through supply arrangements or other government internal procurement methods including as a minimum the following:
  - i. Identification of furniture type (e.g. desking or panel hung systems etc.);
  - ii. Description of components (e.g. overhead bins, file pedestal etc.);
  - iii. Dimensions;
  - iv. Typical layouts;
  - v. Total number of each layout type and/or total component count;
  - vi. Technical requirements (e.g. panel height(s), mobility, height adjustability, electrical requirements etc.);
  - vii. Finishes; and
  - viii. Associated unit price ranges and budget information.
- q) Submit for review. Revise as required. Resubmit for final approval.

### **RS 3.13 Final Building Capability Recommendations**

- 3.13.1 Revise Preliminary Building Capability Recommendations to update preliminary recommendations and alternative remedial measures for areas of concern and include recommendations for any additional and necessary modifications/adaptations to the building systems to support the Client Department's approved functional requirements, schematic design, vertical stacking and horizontal zoning. Assess their impact on space, time and budget.
- 3.13.2 Coordinate work performed by sub-consultants (i.e. Mechanical and Electrical Engineering) and incorporate into final document.
- 3.13.3 Submit for review. Revise as required. Resubmit for final approval.
- 3.13.4 The approved Final Building Capability Recommendations shall be included in the Final Functional Program Document.

### **RS 3.14 Final Sustainability Recommendations**

- 3.14.1 Refer to PA1.7
- 3.14.2 Revise Preliminary Sustainability Recommendations to update preliminary recommendations and alternative remedial measures for areas of concern and include recommendations for any additional and necessary modifications/adaptations to the building systems to support the Client Department's approved functional requirements, schematic design, vertical stacking and horizontal zoning. Assess their impact on space, time and budget.
- 3.14.3 Final report to include strategies from the latest "WELL and FitWel Building Standards" principles; and in line with Sustainability Handbook.
- 3.14.4 Coordinate work performed by sub-consultants (i.e. Mechanical and Electrical Engineering) and incorporate into final document.
- 3.14.5 Submit for review. Revise as required. Resubmit for final approval.
- 3.14.6 The approved Final Sustainability Recommendations Report shall be included in the Final Functional Program Document.

### **RS 3.15 Class 'C' Estimate**

- 3.15.1 Prepare a Class 'C' estimate (Elemental Cost Analysis). Estimate shall be summarized in a consistent Elemental format, as agreed to with the PWGSC Representative.
- 3.15.2 Cost estimate is to include as a minimum, Architectural, Interior Design, Mechanical and Electrical. Class 'C' estimate is to isolate and show separately the cost of base building costs, fit-up costs and Client Department costs and further isolate and show separately the cost of individual building blocks and/or the required accommodation

sections (refer to the funding accountabilities identified in the most recent Government of Canada Workplace Fit-up Standards).

- 3.15.3 Submit for review. Revise as required. Resubmit for final approval.

### **RS 3.16 Final Functional Program Document (100%)**

- 3.16.1 Update the 99% Functional Program Document to include revisions to requirements and documents prepared during the Functional Program phase. Incorporate and adjust document based on services and deliverables prepared during the Design Concept phase. All sub-consultant work is to be included and incorporated into the Final Functional Program Document.
- 3.16.2 When conflicting requirements or recommendations occur, provide an integrated and final recommendation together with adequate justification.
- 3.16.3 Prior to submission of the final functional program document, it is the Consultant's responsibility to ensure that all requirements which are NOT part of the most recent Government of Canada Workplace Fit-up Standards, have been clearly identified.
- 3.16.4 Submit for review, revise as required and resubmit for final approval.

## **RS 4.0 DESIGN DEVELOPMENT**

The purpose of RS 4: Design Development is to finalize the approved Client fit-up requirements developed in RS3: Schematic Design by preparing preliminary and final partition/furniture plans, coordinating the final selection and procurement of furniture if required, update Commissioning Plan, and ensuring all of the aforementioned works with the general infrastructure of the building(s). The plans and recommendations developed in this section will be used to prepare construction drawings and specifications in the next phase of the project, i.e. RS 5 Construction Documents.

### **RS 4.1 Preliminary Partition/Furniture Plans (66% Complete)**

- 4.1.1 Prepare preliminary partition/furniture plans that include as a minimum the following:
- a) Partition locations including door swings;
  - b) Preliminary layouts for all furniture and furnishings in open and enclosed workpoints, support space and special purpose space;
  - c) Location and identification of equipment including as a minimum photocopiers, printers, fax machines;
  - d) Update the Space Planning Workbook to ensure compliance with Government of Canada Workplace Fit-up Standards;
  - e) Identification of all room/areas including name, room number, size; and
  - f) Identification of units, branches, divisions, groups.
- 4.1.2 Submit for review. Revise as required. Resubmit for final approval.

## **RS 4.2 Preliminary Furniture Manufacturer/Supplier Documents (66% Complete)**

- 4.2.1 Review furniture manufacturer's requirements for all new furniture including freestanding and/or systems furniture, and equipment along with preliminary partition/furniture plans.
- 4.2.2 As required, incorporate modifications to the furniture layout in RS 4.4 Final Partition/Furniture Plans.

## **RS 4.3 Furniture Procurement Package**

### **4.3.1 General procurement Strategy:**

- a) The Consultant is to select furniture on Supply Arrangement (SA) when possible;
- b) If non-SA items are required, PWGSC's Design Advisor will be consulted and a strategy will be discussed/developed.

### **4.3.2 Documents/Deliverable:**

- a) PWGSC Client Search Tool (CST) must be completed by the Consultant for categories 1 through 6 and provided to the PWGSC's Design Advisor;
- b) For Office Seating, the consultant must use the "PSPC Chair Builder".
- c) The Consultant must complete the template: request for bid (RFB) and submit to PWGSC for review in advance for revisions/comments;
- d) The Consultant is responsible for all drawings (CAD and PDFs), notes, legends meeting PWGSC/AB standards for the solicitation process;
  - i. PDFs – one (1) plan for cat 1, 2 & 5 and one (1) plan for cat 6
  - ii. PDFs – Typical Data Sheets for cat 1,2 & 5
  - iii. PDFs – Panel Matrixes
  - iv. DWG - Provide one separate Layout TAB for Cat 1,2 &5 and another Layout TAB for Cat 6.
- e) The Consultant must incorporate the project schedule received from the PWGSC's Design Advisor for furniture timeline into the Master Schedule of the project (incorporation of general furniture activities i.e. furniture install to start, electrician schedule for furniture hook and Shared Services Canada hook up) in relation to project activities;
- f) The Consultant must provide quotes for directed solicitations (under \$25K);
- g) All documents must be provided in both official languages prior to solicitation process.

### **4.3.3 Solicitation of Furniture:**

- a) The Consultant must have knowledge of PWGSC procurement process and timelines;
- b) The Consultant must assist during the Q&A period of solicitation;
- c) The Consultant must provide responses and questions in both official languages;
- d) The Consultant must assist with the product review for SA and technical evaluation for products outside the SA, if applicable;
- e) For a "Request for Proposal" (RFP);
  - i. The consultant must create and compose a written proposal that provides a general descriptive detail of the furniture to be procured.

- ii. Prime consultant to provide a document to include and use the following: Main headings – Scope of Work, list of products and requirements with sub-headings – description, dimension, finishes, power and data and support/base with an appendix that illustrates in either grayscale or line drawing of product as a reference only.
- iii. The document needs to be provided in both English and French.

#### 4.3.4 Award or Furniture Contract:

- a) The Consultant must provide PWGSC with site information for delivery and installation;
- b) The Consultant must provide a written confirmation/email to PWGSC of finishes selections;
- c) The Consultant must advise PWGSC of contract changes to forward to the Acquisition Branch for contract amendments with justifications.

#### 4.3.5 Delivery and Installation:

- a) The Consultant must coordinate the delivery and is responsible for the receiving of all furniture and inspection on site;
- b) The Consultant must coordinate and supervise the installation of all furniture;
- c) The Consultant must coordinate the deficiency walk-through and prepare a furniture deficiency list to be provided to the vendor(s) and PWGSC;
- d) The Consultant must coordinate and oversee the completion of all furniture installations in conjunction with section RS 7.19.3; and
- e) The Consultant must coordinate and ensure that all deficiencies are resolved and to update the furniture deficiency list on a bi-weekly basis.

### **RS 4.4 Furniture and Finishes Board(s)**

#### 4.4.1 Prepare furniture and finishes board(s) that clearly demonstrates the furniture and finishes selected for the project including as a minimum the following:

- a) Furniture and furnishings selected.
- b) Final approved colour scheme for walls, floors, ceilings, furniture and furnishings including a legend;
- c) Specialized lighting;
- d) Specialized details; and
- e) Hardware.

#### 4.4.2 In a written format, identify the final approved colour scheme as a minimum for walls, floors, ceilings, millwork, furniture and furnishing items and indicate corresponding information as a minimum: quantity, manufacturer, style, colour, finishes and reference numbers etc.

#### 4.4.3 Submit for review. Revise as required. Resubmit for final approval.

### **RS 4.5 Final Partition/Furniture Plans (99% Complete)**

#### 4.5.1 In addition to information provided on preliminary furniture plans, prepare final furniture plans that include as a minimum the following:

- a) Partition type;
  - b) Final layout for all furniture and furnishings in open and enclosed workpoints, support space and special purpose space;
  - c) Special requirements (i.e. audio visual etc.);
  - d) Security requirements; and
  - e) Identification of special mechanical and plumbing requirements.
- 4.5.2 Coordinate preparation and development of Final Partition/Furniture plan with Mechanical and Electrical sub-consultants.
- 4.5.3 Provide Furniture CADD drawings in \*dwg format which indicate one layer for each type of furniture. Provide as a minimum:
- a) New Freestanding – chair, filing cabinets, etc;
  - b) New Systems – panels, work surfaces; and
  - c) Refurbishment of Existing Furniture – panels, work surfaces, chairs, desks.
- 4.5.4 Submit for review. Revise as required. Resubmit for final approval pending review and approval by Authorities having Jurisdiction.

#### **RS 4.6 Review and Approval by Authorities Having Jurisdiction**

- 4.6.1 Submit final partition/furniture plans for review by Authorities having Jurisdiction including Fire Protection Engineers among others to ensure compliance with all applicable codes.
- 4.6.2 Revise plans as required. Provide written response to comments received from Authorities having Jurisdiction.
- 4.6.3 Coordinate review and approval process by Authorities having Jurisdiction with Mechanical and Electrical sub-consultants and ensure written responses to comments are provided.
- 4.6.4 Resubmit for final approval, as required.

Note: Refer to PA 3.4 Review and Approval by Authorities Having Jurisdiction.

#### **RS 4.7 Review of Final Furniture Manufacturer/Supplier Documents (99% Complete)**

- 4.7.1 Review Furniture Manufacturers/Suppliers installation plans for freestanding furniture, systems furniture and refurbishment of existing furniture. Ensure compliance with the approved furniture plans and the Client Department's functional requirements.
- 4.7.2 The Consultant to verify and confirm that all furniture installation drawings indicate, as a minimum, the following:
- a) All furniture (including sizes and dimensions);
  - b) Quantities per floor, types and model numbers;

- c) Furniture location and critical dimensions required to ensure a safe and proper assembly;
- d) Finishes and fabric(s) specifications;
- e) Indications of powered and non-powered screens/panels;
- f) Coat hook;
- g) Workstation and room numbers;
- h) Employee names;
- i) Electrical duplex outlets;
- j) Telecommunication/data symbols;
- k) Power harness requirements;
- l) Lighting components requirements and specifications; and
- m) Identification of custom cuts and retrofitting of work surfaces, panels and all other components as required, due to site condition interferences;
- n) Conformance with all applicable codes, standards and regulations.
- o) Conformance with the Government of Canada Fit-up Standards.

Note: The Consultant shall ensure that a competent individual with detailed, comprehensive, technical knowledge of all furniture and hardware verifies the specification and requirement for the new furniture and hardware.

- 4.7.3 Submit required information and comments for review. Ensure Final Furniture Manufacturer/Supplier Documents are revised as required. Resubmit for final approval.
- 4.7.4 The Project Manager will obtain written approval of the Furniture Installation drawings by the Client, prior to procurement, delivery and installation.
- 4.7.5 Coordinate furniture requirements and review with mechanical and electrical sub-consultants.
- 4.7.6 The Consultant shall review all quotations for new and refurbishment of furniture and hardware to ensure compliance with the quantities and types as identified on the approved required furniture and hardware plans.
- 4.7.7 Confirm if quotation is fair and reasonable and sign-off and stamp furniture manufacturer/supplier documents "Reviewed and Recommended".  
Note: The consultant's signature shall be required for sign-off.

#### **RS 4.8 Mechanical, Electrical and Communications/Data Plans**

- 4.8.1 Based on final plans, Government of Canada Workplace Fit-up Standards and the Client Department requirements, prepare mechanical, electrical and communications/data plans that identify the location and number of outlets required for both open and enclosed workpoints, support spaces, and special purpose spaces.

Note: The electrical and communications/data plans shall include as a minimum, work surfaces for both open and enclosed workstations/ work settings, and room/area designations.

- 4.8.2 Submit for review. Revise as required. Resubmit for final approval pending review and approval by Authorities having Jurisdiction.
- 4.8.3 Coordinate preparation of Mechanical, Electrical and Communications/Data Plans with Mechanical and Electrical sub-consultants.

#### **RS 4.9 Class 'B' Estimate**

- 4.9.1 Prepare a Class 'B' estimate (Elemental Cost Analysis). Estimate shall be summarized in a consistent Elemental format, as agreed to with the Project Manager.
- 4.9.2 Cost estimate is to include as a minimum, costs for Architectural, Interior Design, Mechanical and Electrical. Class 'B' estimate is to isolate and show separately the cost of base building costs, fit-up costs and Client costs and further isolate and show separately the cost of individual building blocks and/or the required accommodation sections (refer to the funding accountabilities identified in the Government of Canada Workplace Fit-up Standards).
- 4.9.3 Submit for review. Revise as required. Resubmit for final approval.

#### **RS 4.10 Signage and Wayfinding**

- 4.10.1 Provide the following services related to signage and wayfinding within the Client Department's office space and/or leading to their office space including as a minimum:
  - a) Coordinate with PWGSC authorities responsible for Federal Identity Program;
  - b) Prepare design concept options, design development, presentation(s) as required, and tender documents;
  - c) Signage and Wayfinding nomenclature to match the latest GCworkplace workpoints nomenclature;
  - d) Conduct site inspection; and
  - e) Prepare deficiency report.
- 4.10.2 Submit for review. Revise as required. Resubmit for final approval.

#### **RS 4.11 Window Treatments**

- 4.11.1 Determine required window treatments.
  - a) Prepare specifications.
  - b) Obtain budget pricing.
  - c) Submit for review. Revise as required. Resubmit for final approval.
  - d) Prepare tender documents as required.
  - e) Conduct site inspection(s).
  - f) Prepare deficiency report.



## **RS 5.0 CONSTRUCTION DOCUMENTS**

The purpose of RS 5: Construction Documents is to prepare construction drawings and specifications in accordance with the final approved Client fit-up requirements developed for the Client Department in RS 4: Design Development. The consultant shall coordinate mechanical and electrical sub-consultant deliverables including Commissioning Plan. The construction drawings and specifications will be used by the Project Manager to obtain and evaluate bids in the next phase of the project, i.e. RS 6: Tender Call, Bid Evaluation & Construction Contract Award.

### **RS 5.1 General Requirements**

- 5.1.1 The Consultant shall prepare construction documents in accordance with PA 1.3: Language Requirements and SC 2: Language Requirements.
- 5.1.2 Construction documents shall be submitted at the 66%, 99% and 100% stages of completion in accordance with PA 3.3 to PA 3.5 inclusive.

### **RS 5.2 Construction Drawings**

- 5.2.1 Prepare construction drawings including all required architectural, mechanical, electrical and structural drawings.
- 5.2.2 Architectural/Interior Design drawings shall include, as a minimum, the following:
  - a) Title Sheet
  - b) Demolition Plan
  - c) Partition Plan
  - d) Furniture Plan
  - e) Reflected Ceiling Plan
  - f) Wall Finishes Plan
  - g) Floor Finishes Plan
  - h) Elevations/Sections
  - i) Detail/ Millwork Drawings; and
  - j) Schedules.
- 5.2.3 Mechanical drawings shall be prepared in accordance with “Doing Business with NCA” and PA 1.8: Reference Documents and shall include as a minimum the following:
  - k) Title Sheet;
  - l) Demolition Plan;
  - m) All mechanical systems including fire protection and layouts.
- 5.2.4 Electrical drawings shall be prepared in accordance with “Doing Business with NCA” and PA 1.8: Reference Documents and shall include as a minimum the following:
  - a) Title Sheet;
  - b) Demolition Plan;
  - c) Lighting, controls and fire alarm systems; and

d) Power layout and communications/data system;

5.2.5 Ensure mechanical and electrical engineers coordinate conduit space requirements with communications and security resources (including sub-consultants, PWGSC and Client Department). Ensure conduit requirements are indicated on electrical drawings.

5.2.6 Ensure mechanical and electrical engineers coordinate all security requirements with security resources (including Sub-Consultants, PWGSC and Client Department). Ensure all necessary power and/or HVAC requirements are indicated on mechanical and electrical drawings.

Note 1: When bilingual construction documents are required, separate construction documents shall be prepared for each official language.

Note 2: The languages are considered equal in status; neither is considered to be a translation of the other.

### **RS 5.3 Construction Specifications**

5.3.1 Prepare construction specifications including Architectural/Interior Design, Mechanical and Electrical, and Sustainable/Waste Management in accordance with “Doing Business with NCA, Specifications in Section 3 Guide to Preparation of Construction Documents for PWGSC”.

Note 1: When bilingual construction documents are required, separate construction documents shall be prepared for each official language.

Note 2: The languages are considered equal in status; neither is considered to be a translation of the other.

5.3.2 Review and Approval by Authorities Having Jurisdiction

5.3.3 Submit construction documents for review by Authorities having Jurisdiction – Fire Protection Engineers among others to ensure compliance with all applicable codes.

5.3.4 Revise plans as required. Provide written response to comments received from Authorities having Jurisdiction.

5.3.5 Coordinate review and approval process by Authorities having Jurisdiction with Mechanical and Electrical sub-consultants and ensure written responses to comments are provided.

5.3.6 Resubmit for final approval.

Note: Refer to PA 3.4 Review and Approval by Authorities having Jurisdiction.

### **RS 5.4 Waste Management Program**

5.4.1 The Consultant must develop a Non-Hazardous CRD Waste Management Program for the Project, which must include the following key deliverables:

5.4.2 Prior to construction:

- a) Waste Audit – Determines the types and volumes of construction materials that will be produced as surplus to the project, as well as the preliminary options and diversion potentials for waste reduction, reuse and recycling. Since PWGSC has committed to a diversion target of 90% overall, all efforts should be made to maximize waste avoidance and diversion, confirming feasibility of target based on the results of the waste audit. The Demolition Consultant will provide the Consolidated Waste Inventory of the demolition project's scope to inform the Waste Audit in full consultation and coordination with the Consultant.
- b) Waste Reduction Work Plan – Identifies the overall waste diversion goal and material specific targets. It describes project specific procedures to maximize the recovery of those materials identified in the Waste Audit. This also includes the Material Source Separation Program that details on-site sorting and labelling practices, tracking and reporting procedures and destinations for the materials recovered to be implemented during the construction phases of the project.

5.4.3 During and post-construction:

- a) Training – Includes presentation of a mandatory training session to be given prior to the commencement of the work on site and attendance at a midpoint update meeting, convened by the project manager, to discuss progress and challenges of the Waste Reduction Work plan; and
- b) Waste Diversion Report – Documents the recovered construction materials to ensure that the results anticipated in the Waste Audit and Waste Reduction Work plan are realized to the highest degree possible. It records the results at the end of the project, using hauling and tracking records to confirm the quantities (percent and tonnage) and final destinations of the materials diverted/landfilled.

5.4.4 Coordinate work performed by Mechanical and Electrical sub-consultants and incorporate into final report.

5.4.5 Submit for review. Resubmit as required. Submit for final approval.

## **RS 5.5 Class 'A' Estimate.**

5.5.1 Prepare a Class 'A' estimate (Elemental Cost Analysis). Estimate shall be summarized in a consistent Elemental format, as agreed to with the Project Manager.

5.5.2 Cost estimate is to include, as a minimum, Architectural, Interior Design, Mechanical and Electrical. Class 'A' estimate is to isolate and show separately the cost of base building costs, fit-up costs and Client costs and further isolate and show separately the cost of individual building blocks and/or the required accommodation sections (refer to the funding accountabilities identified in the Government of Canada Workplace Fit-up Standards).

- 5.5.3 Submit for review. Revise as required. Resubmit for final approval.

## **RS 6.0 TENDER CALL, BID EVALUATION & CONSTRUCTION CONTRACT AWARD**

The purpose of RS 6: Tender Call, Bid Evaluation and Construction Contract Award service is to obtain and evaluate bids from qualified contractors to ensure the project is constructed in accordance with RS5: Construction Documents.

### **RS 6.1 Tenderers' Briefing Meeting(s)**

- 6.1.1 The Project Manager may call briefing meeting(s) to clarify requirements of a project.

Note: Questions arising from such meetings shall be answered by written addenda.

- 6.1.2 The Consultant and Sub-Consultants shall be required to attend such meetings.

### **RS 6.2 Documentation Interpretation**

- 6.2.1 The Consultant shall provide the Project Manager with all information required by Tenderers to fully interpret the Architectural/Interior Design, Mechanical and Electrical Construction Documents.

- 6.2.2 The Consultant shall keep full notes of all inquiries during the bidding period and submit the same to the Project Manager at the end of the bidding period.

### **RS 6.3 Addenda**

- 6.3.1 The Consultant shall prepare and coordinate Architectural/Interior Design, Mechanical and Electrical addenda when necessary (in an approved written format in both official languages), and submit the same to the Project Manager for issue by the contracting authority (see SC 2: Language Requirements and PA 1.3: Language Requirements). Copies of Addenda shall also be submitted to the PWGSC Design Advisor (Accommodation Management & Workplace Solutions) for reference.

Note 1: Time is of the essence.

Note 2: No addendum shall be issued orally.

- 6.3.2 The Consultant and sub-consultant shall examine and report on any cost and schedule impact created by the issue of tender contract addenda.

### **RS 6.4 Tender Evaluation by Consultant**

- 6.4.1 If required, the Consultant and Sub-Consultants shall review and evaluate tenders and advise the Project Manager as to their acceptability.
- 6.4.2 If required, the Consultant and sub-consultant shall assist in tender evaluation by providing advice on the following:
- a) Completeness of tender documents in all respects;
  - b) Technical aspects of the tenders;
  - c) Effect of alternatives and qualifications which may have been included in the tender;
  - d) Tenderers' capability to undertake the full scope of work.
- 6.4.3 If PWGSC decides to re-tender the project as a result of a deviation from the Class 'A' estimate provided by the consultant, provide the following:
- a) Advice and assistance to the Project Manager;
  - b) Revise and amend, at your cost, the construction documents to bring the cost of the work within the limits stipulated; and
  - c) Examine and report on any cost and schedule impact created by the issue of tender/contract addenda.

## **RS 7.0 CONSTRUCTION & CONTRACT ADMINISTRATION**

The purpose of RS 7: Construction and Contract Administration is to implement the project in accordance with the 'Construction Documents – Issued for Construction' (see RS 7.1) and to direct and monitor all necessary or requested changes to the scope of work during construction.

The consultant shall coordinate mechanical and electrical sub-consultant services including Commissioning Plan required for services listed under RS 7 Construction and Contract Administration.

### **RS 7.1 'Construction Documents – Issued for Construction'**

- 7.1.1 Update the tendered Construction Documents to include any revisions.
- 7.1.2 Confirm in writing that all revisions have been integrated into the 'Construction Documents – Issued for Construction'.
- 7.1.3 Submit 'Construction Documents – Issued for Construction' in accordance with PA 3.3 to PA 3.5 inclusive to the following:
- a) two (2) hard copies to the Project Manager
  - b) one (1) hard copy to the Contractor;
  - c) one (1) hard copy to the Client; and
  - d) two (2) hard copies and two (2) in electronic format to the ACCOMMODATION MANAGEMENT & WORKPLACE SOLUTIONS Professional and Technical Resource.
- 7.1.4 Ensure the Contractor's copy is kept on site for use as record drawings.

### **RS 7.2 Construction Meetings**

- 7.2.1 Immediately after Contract Award arrange a briefing meeting with the Contractor, the Client Department, the Project Manager and the PWGSC Design Advisor (Accommodation Management & Workplace Solutions). Prepare minutes of the meeting and distribute copies to all participants and to other persons agreed upon with the Project Manager within 48 hours.
- 7.2.2 Call construction meetings every week, commencing with the construction-briefing meeting. The meetings should include the job superintendent, Inspector of Construction, main sub-subcontractors, affected sub-consultants and Government Services representatives as necessary. Prepare minutes of the meetings and distribute copies to all participants within 48 hours. The Project Manager may invite the Client Department to attend any of these meetings.

Note: Number of construction meetings will be determined at time of Call-Up and will be amended and negotiated during the construction phase of the project.

### **RS 7.3 Construction Schedule**

- 7.3.1 Obtain the Project Construction Schedule with detailed Commissioning component shown separately, as soon as possible after contract award and ensure proper distribution to the project team.
- 7.3.2 Monitor the approved construction schedule and make all reasonable efforts to ensure that the schedule is maintained and to assist the Contractor to avoid delays.
- 7.3.3 Submit a detailed report concerning any delays and advise of any potential changes to project scope. Keep accurate records of causes of delays.

### **RS 7.4 Time Extensions**

- 7.4.1 Only PWGSC may approve any request for Time Extensions. Approval will be issued in writing by the Project Manager.

### **RS 7.5 Site Inspections**

- 7.5.1 Provide construction inspection services twice weekly to ensure compliance with 'Construction Documents – Issue for Construction'.
- 7.5.2 Provide services of qualified personnel who are fully knowledgeable with technical and administrative requirements of project.
- 7.5.3 Establish a written understanding with the Contractor as to what stages or aspects of the work are to be inspected prior to being covered up.

- 7.5.4 Assess quality of work, and identify in writing to the Contractor and the Project Manager all defects and deficiencies observed at the time of such inspections.
- 7.5.5 Inspect materials and prefabricated assemblies and components at their source or assembly plant, as necessary, for the progress of the project.
- 7.5.6 Any directions, clarifications and/or deficiency lists shall be issued in writing to the Project Manager.

#### **RS 7.6 Testing**

- 7.6.1 Prior to tender, provide the Project Manager with a recommended list of tests to be undertaken, including on site and factory testing.
- 7.6.2 Ensure all testing is detailed within Commissioning Plan.
- 7.6.3 When contract is awarded, assist the Project Manager in briefing testing firm on, as a minimum, required services, distribution of reports, communication lines.
- 7.6.4 Review all test reports and take necessary action with Contractor when work fails to comply with contract.
- 7.6.5 Immediately notify Project Manager when tests fail to meet project requirements and when corrective work will affect schedule.
- 7.6.6 Assist Project Manager in evaluating testing firm's invoices for services performed.

#### **RS 7.7 Training**

- 7.7.1 Prior to tender, provide the Project Manager with recommended list of training to be undertaken.
- 7.7.2 Ensure all training is detailed within the Commissioning Plan.

#### **RS 7.8 Progress Reports**

- 7.8.1 Report weekly in a written format to the Project Manager on the progress and quality of the work.

#### **RS 7.9 Work Measurement**

- 7.9.1 If work is based on unit prices, measure and record the quantities for verification of monthly progress claims and the Final Certificate of Measurement.
- 7.9.2 When the Contemplated Change Notice is to be issued based on Unit prices, keep accurate account of the work. Record dimensions and quantities.

## **RS 7.10 Clarifications/Detail Drawings**

- 7.10.1 Provide clarifications on 'Construction Documents – Issued for Construction' and/or site conditions, as required, to ensure project is not delayed.
- 7.10.2 Provide additional detail drawings 'as and when requested' to clarify or interpret the 'Construction Documents – Issued for Construction'.

## **RS 7.11 Shop Drawings**

- 7.11.1 Review and comment on all shop drawings.
- 7.11.2 Ensure shop drawings are stamped "Checked and Certified Correct for Construction" by the Contractor, and stamped "Reviewed and Approved" and signed by the Consultant before returning them to the Contractor.
- 7.11.3 On completion of the project, forward three (3) copies of the reviewed shop drawings in binder format to the Project Manager and (1) copy to the PWGSC Design Advisor (Accommodation Management & Workplace Solutions). Ensure shop drawings include the project number and are recorded in sequence.

## **RS 7.12 Construction Changes**

- 7.12.1 Upon approval by the Project Manager, obtain detailed quotations from the Contractor. Review prices and promptly forward recommendations to the Project Manager.
- 7.12.2 Prepare Contemplated Change Notices (CCNs) and Change Orders (COs).
- 7.12.3 The Project Manager will issue Consultant-prepared CCNs and Change Orders (COs) to the Contractor, with copy to the Consultant and PWGSC Design Advisor (Accommodation Management & Workplace Solutions).
- 7.12.4 The Project Manager shall approve all Changes that affect cost or design.
- 7.12.5 Change Orders shall cover all changes, including those not affecting the cost of the project.
- 7.12.6 The practice of "trade-offs" is not permitted.

## **RS 7.13 Cost Breakdown**

- 7.13.1 1. Obtain from the Contractor detailed cost breakdown on the standard PWGSC form and submit to the Department with the first Progress Claim.

## **RS 7.14 Sub-Contractor Changes**



- 7.14.1 The Contractor is required to use the sub-contractors listed on the tender form unless a change is authorized by PWGSC. Changes are only considered when they involve no increase in cost. Review all requests for changes of sub-contractors, and submit recommendations to the Project Manager.
- 7.14.2 When the sub-contractors have not been listed on the Tender Form, obtain the list from Contractors no later than ten (10) working days after date of award.

#### **RS 7.15 Labour Requirements**

- 7.15.1 The Contractor is bound by the Contract to maintain competent and suitable workers on the project and to comply with the Canada Department of Labour - Labour Conditions. Inform PWGSC of any labour situations that appear to require corrective action.
- 7.15.2 The Consultant shall ensure that a copy of the Labour Conditions for the Contract is posted in a conspicuous place on site.

#### **RS 7.16 Construction Safety**

- 7.16.1 All construction projects that are occupied by federal employees during construction are subject to the Canada Occupational Safety and Health Act and Regulations as administered by Health Canada and/or Provincial Regulations – whichever is more restrictive.
- 7.16.2 In addition to the above, the Contractor must comply with the provincial and municipal safety laws and regulations, and with any instructions issued by the officers of these Authorities having Jurisdiction relating to construction safety.
- 7.16.3 Ensure the Contractor is mandated to provide all required coordination, isolation, protection and reinstatement of the fire protection and suppression systems throughout construction. Notify the Property Manager each time the fire protection and suppression systems are bypassed and advise of estimated reinstatement time.

#### **RS 7.17 Contractor's Progress Claims**

- 7.17.1 Examine progress claims in a timely manner and, if acceptable, certify the progress claims for work completed and materials delivered pursuant to the construction contract.
- 7.17.2 Submit the progress claims to the Project Manager for approval and processing on a monthly basis.
- 7.17.3 Submit the following with each progress claim:
  - a) Updated schedule of the progress of the work; and
  - b) Photographs of the progress of the work.

## **RS 7.18 Materials on Site**

- 7.18.1 The Contractor may claim for payment of material on site but not incorporated in the work.
- 7.18.2 Materials must be stored in a secure place designated by the Project Manager.
- 7.18.3 A detailed list of materials with supplier's invoices showing the price of each item must accompany a claim. The Consultant shall check and verify this list (Material Identification Sheet).
- 7.18.4 Items shall be listed separately on the Material Identification Sheet after the breakdown list and total.
- 7.18.5 As material is incorporated in the work the cost must be added to the appropriate
- 7.18.6 Detail item and removed from the Material Identification Sheet.

## **RS 7.19 Furniture Delivery, Installation, Inspections and Deficiency Lists**

- 7.19.1 The Consultant shall coordinate the furniture and hardware deliveries and installation schedules to correspond with the Master Schedule and in consultation with the Project Manager and PWGSC Design Advisor (Accommodation Management & Workplace Solutions).
- 7.19.2 The Consultant shall oversee installation of furniture by Furniture Manufacturer/Supplier.
- 7.19.3 Provide instructions and/or resolve problems as and when required. Provide a detailed furniture and hardware tracking report in a spreadsheet or database format, compatible to the latest version of Microsoft Excel (or equivalent approved by the Project Manager). Refer to section RS 4.3.5. Furniture and hardware tracking report to be updated on a weekly basis and should include as a minimum the following:
  - a) Scheduled delivery dates;
  - b) Anticipated and actual delivery dates;
  - c) List of furniture and hardware including finishes, sizes, manufacturer and product identification;
  - d) Quantities;
  - e) Location;
  - f) Scheduled inspections; and
  - g) Status i.e. deficiencies, acceptance.
  - h) Supplier information (contact name and number).

Note: Any changes to be approved by the Project Manager.

- 7.19.4 The Consultant shall receive and verify that all new furniture and hardware product received at an off-site storage facility and/or at the work site matches all packing slips and orders, and shall hand over the packing slips to the Project Manager.

- 7.19.5 The Consultant shall coordinate the delivery and installation of all furniture and hardware to coincide with the electrical and communication trades through the Project Manager.
- 7.19.6 Upon completion of the furniture and hardware installation for each floor, the Consultant shall ensure that:
- a) Screen/panel fabric and upholstered furniture is clean, without fabric flaws, tears, stains, sun damage or discolouration.
  - b) Fabric is securely attached to all screens/panels without frayed edges, puckering and/or pulls;
  - c) Furniture and hardware is clean, with no dents, scuffs, chips, scratches or exposed sharp edges;
  - d) Plastic laminate surfaces are clean, with no scratches, chips or evidence of de-lamination;
  - e) Plastic laminate edges are smooth, clean, sealed, free from dents, chips and scratches, with no exposed substrate visible;
  - f) Operable furniture and hardware components are clean and in functional working order, including as a minimum: overhead storage bin mechanisms, keyboard tray articulating mechanisms, pedestal drawers, and light fixtures including lamps and ballasts.
- 7.19.7 The Consultant shall conduct furniture and hardware installation inspections with the Client, Construction Coordinator, Project Manager and PWGSC Design Advisor (Accommodation Management & Workplace Solutions) within one (1) week of the completion of furniture and hardware installations for each floor, and provide the Project Manager with a minimum of one (1) week notice to coordinate the inspection date and time. Inspections shall be scheduled on weekdays between the hours of 8 am and 4 pm, unless otherwise notified by the Client or Project Manager.
- 7.19.8 The Consultant shall prepare a Furniture and Hardware Deficiency/Discrepancy Inspection Report during the furniture and hardware installation inspections, to be signed-off by the Client at the end of each inspection. The report shall be prepared in a spreadsheet or database format, compatible to the latest version of Microsoft Excel (or equivalent approved by the Project Manager) to track all deficiencies and approved discrepancies to be implemented. The spreadsheet shall include as a minimum, the following identification:
- a) If the item is a Deficiency or a Discrepancy;
  - b) If the item is a Discrepancy, whether it has been approved or rejected by the Departmental Representative;
  - c) Comprehensive description of the Deficiency/Discrepancy;
  - d) Date when the Deficiency/Discrepancy was observed (typically the inspection date);
  - e) Location of Deficiency/Discrepancy by floor and workstation/room number;
  - f) Action required [such as repaired/corrected during inspection, serviced on-site, removed and serviced off-site, ordering of part(s)];
  - g) Anticipated delivery date for part(s) ordered;
  - h) Anticipated completion date;
  - i) Actual completion date;
  - j) Actual completion date when the Client signs off that the Deficiency/Discrepancy is complete.

- 7.19.9 The Consultant shall also prepare a list of discrepancy items, which were noted or requested during the installation or inspection. The Consultant shall provide a copy of the signed off preliminary deficiency inspection report and list of the discrepancy items to the Project Manager and PWGSC Design Advisor (Accommodation Management & Workplace Solutions) at the end of each inspection.
- 7.19.10 Within forty-eight hours (48h) of each inspection, the Consultant shall provide a written response to the Project Manager and PWGSC Design Advisor (Accommodation Management & Workplace Solutions) relating to the management of discrepancies, indicating the impact on the cost, furniture schedule and quality of work, and await approval from the Project Manager prior to incorporating/implementing the change.
- 7.19.11 At a minimum the Consultant shall update the Furniture and Hardware Deficiency/Discrepancy Inspection Report on a weekly basis, after completing each furniture and hardware installation and shall ensure that the Furniture and Hardware Deficiency/Discrepancy Report remains accurate at all times. Provide to the Project Manager, PWGSC Design Advisor (Accommodation Management & Workplace Solutions) and Client for review, a hard copy of the completed itemized report, which relates only to the inspection area completed.
- 7.19.12 Project Manager shall review and provide written concurrence every week during the installation phase, that all items marked as completed on the Furniture and Hardware Deficiency/ Discrepancy Inspection Report have been rectified.

#### **RS 7.20 Interim Acceptance**

- 7.20.1 Inform the Project Manager when the project is substantially completed.
- 7.20.2 Attend all meetings of the Project Acceptance Board organized by the Project Manager.
- 7.20.3 Document all unacceptable and incomplete work identified by the Acceptance Board on the designated form provided by the Project Manager.

Note: The Acceptance Board shall accept the project from the Contractor subject to the deficiencies and incomplete work listed and priced.

#### **RS 7.21 Certificate of Substantial Performance (Interim)**

- 7.21.1 Examine certificates of substantial performance (interim) in a timely manner and, if acceptable, certify the interim inspection and certificate forms for work completed and material delivered pursuant to the construction contract.

Note: Payment requires completion and signing, by the parties concerned, of the following documents: Certificate of Substantial Performance, Cost Breakdown, Statutory Declaration and Workman's Compensation Clearance Certificate.

- 7.21.2 Submit the forms to the Project Manager for approval and processing.

### **RS 7.22 Operation and Maintenance Data Manual**

- 7.22.1 Obtain (4) sets of each volume of the Operation and Maintenance Data Manual from the Contractor.
- 7.22.2 Operation and Maintenance Data Manual to be verified for completeness, relevance and format by the Interior Design/Architectural, Mechanical and Electrical Consultants and submitted to the PWGSC Project Manager prior to interim acceptance or actual start of operation and instruction period, whichever occurs sooner. The Contractor shall retain one copy of each volume for his record and use during the instruction period.

### **RS 7.23 Instruction of Operating Personnel**

- 7.23.1 Make arrangements and ensure that PWGSC's operating personnel are properly instructed on the operation of all services and systems using the final manuals as reference.
- 7.23.2 Consultant to provide training sessions, as required, on the subject of design intent and systems operations. Utilize Systems Operation Manual for training sessions.

### **RS 7.24 Keys**

- 7.24.1 Ensure that all keys and safe combinations are delivered to the Project Manager and/or Client as applicable.

### **RS 7.25 Final Inspection**

- 7.25.1 Inform the Project Manager when all work under the contract, including the deficiency items, has been completed.
- 7.25.2 Attend all meetings of the Project Acceptance Board organized by the Project Manager.

Note: The Project Manager reconvenes the Project Acceptance Board which makes a final inspection of the project. If everything is satisfactory, the Board makes final acceptance of the project from the Contractor.

### **RS 7.26 Final Certificates**

- 7.26.1 Examine Certificate of Completion (Final) in a timely manner and, if acceptable, certify the final certificate forms for work completed and materials delivered pursuant to the construction contract.

Note: Final payment requires completion and signing, by the parties concerned, of the following documents: Certificate of Completion (Final), Cost Breakdown, Statutory

Declaration, Workmen's Compensation Clearance Certificate and ESA (Electrical Safety Authority) Certificate.

- 7.26.2 Submit the final certificate forms to the Project Manager for approval and processing.

#### **RS 7.27 Take-over**

- 7.27.1 The official take-over of the project, or parts of the project, from the Contractor is established by the PWGSC Project Team which includes the Consultant and the Client. The date of Certificate of Completion (Interim) and the Certificate of Completion (Final) signifies commencement of the 12 month warranty period for work completed on the date of each certificate in accordance with the General Conditions of the Contract.
- 7.27.2 Provide the Project Manager with original copy of Contractor's warranties for all materials and work covered by an extended warranty or guarantee, according to the conditions of the specifications. Verify their completeness and extent of coverage.

#### **RS 7.28 Warranty Inspections**

- 7.28.1 Provide the Project Manager with original copies, in binder format, of the Contractor's warranties for all materials and work covered by extended warranty or guarantee according to the conditions of the specifications. Verify for completeness and extent of coverage.

#### **RS 7.29 Final Warranty Review**

- 7.29.1 During the Twelve (12) month warranty period, investigate all defects and alleged defects and issue instructions to the Contractor.
- 7.29.2 Conduct a final warranty review.

### **RS 8.0 POST-OCCUPANCY**

The purpose of RS 8: Post Occupancy is to ensure the record drawings described in RS 7 are updated and submitted to the Project Manager and that a Post Occupancy Evaluation Report (POE), if required, is prepared.

#### **RS 8.1 As-Built and Record Drawings and Specifications**

- 8.1.1 Immediately following issue of the Certificate of Completion (Final), obtain two (2) marked up hardcopies from the Contractor of the architectural/interior design, mechanical and electrical as-built drawings and specifications (labeled "As-Built").

- 8.1.2 Notify the Project Manager of any significant deviations in construction from the original Contract drawings, including changes shown on Post-Contract Drawings, changes resulting from Change Orders or from On Site Instructions.
- 8.1.3 Verify all as-built records for completeness and accuracy and submit to Project Manager.
- 8.1.4 Prepare Record Drawings by incorporating As-Built information into project drawings.
- 8.1.5 Record drawings and specifications shall be labeled "Record Drawings" and signed and dated by the Senior Level Consultant assigned to the project.

Note: Consultant to ensure Record Drawings show all furniture etc.

- 8.1.6 Provide a complete set of final shop drawings in binder format.
- 8.1.7 Within six (6) weeks of the final acceptance, submit Record Drawings and Specifications (labeled "Record Drawing") and a complete set of final shop drawings to the following:
  - k) one (1) hard copy to the Project Manager;
  - l) one (1) hard copy to the Client; and
  - m) one (1) hard copy and two (2) electronic non-PDF AutoCAD copies to the PWGSC Design Advisor

Note 1: Record drawings and specifications shall be based on As-built drawings.

Note 2: The Consultant shall ensure all CADD drawings and specifications are prepared in accordance with "Doing Business with NCA" and the PWGSC National CADD Standards (Refer to PA 1.8 Reference Documents).

Note 3: Record drawings and specifications shall be prepared in both official languages in accordance with PA 1.3: Language Requirements.

## **RS 9.0 ADDITIONAL SERVICES**

The purpose of this section is to describe additional services that may be required on an 'as and when requested basis' by the PWGSC Representative.

### **RS 9.1 Other Additional Services**

- 9.1.1 As required and requested by the PWGSC Representative, provide additional services not identified in this Standing Offer and directly related to required services indicated in this document. At time of Standing Offer call-up the PWGSC Representative and PWGSC Design Advisor, will clearly define the additional services.

### **RS 9.2 GCworkplace Feasibility Study**

- 9.2.1 Prepare a report that examines the viability and practicality of a project, where feasibility study services or deliverables are required above and beyond those described in RS 1 to RS 3.

9.2.2 Make detailed and specific recommendations. Provide analysis and justification as required.

9.2.3 Submit for review. Revise as required. Resubmit for approval.

**RS 9.3 Change Management Support**

9.3.1 The Consultant shall clarify roles and responsibilities on Change Management services in order to identify, assess and define the changes brought about by the project and their impact on employees, and guide the organization through the changes.

**END OF STANDING OFFER BRIEF**



# **Submission Requirements and Evaluation (SRE)**

## **SUBMISSION REQUIREMENTS AND EVALUATION (SRE)**

<b>SRE 1</b>	<b>GENERAL INFORMATION</b>
<b>SRE 2</b>	<b>PROPOSAL REQUIREMENTS</b>
<b>SRE 3</b>	<b>SUBMISSION REQUIREMENTS AND EVALUATION</b>
<b>SRE 4</b>	<b>BASIS OF SELECTION</b>
<b>SRE 5</b>	<b>SUBMISSION REQUIREMENTS - CHECKLIST</b>

## **SRE 1 GENERAL INFORMATION**

### **1.1 Reference to the Selection Process**

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

### **1.2 Submission of Proposal**

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

### **1.3 Calculation of Total Score**

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

$$\begin{array}{rcl} \text{Technical Rating} \times 90\% & = & \text{Technical Score (Points)} \\ \frac{\text{Price Rating} \times 10\%}{\text{Total Score}} & = & \frac{\text{Price Score (Points)}}{\text{Max. 100 Points}} \end{array}$$

## **SRE 2 PROPOSAL REQUIREMENTS**

### **2.1 Proposal via Epost Connect service**

1. This solicitation requires Proponents to use the [epost Connect](#) service provided by Canada Post Corporation to transmit their proposal electronically.
2. If the Proponent chooses to submit its proposal electronically through epost Connect service, Canada requests that the Proponent submits its proposal in accordance with section GI 10, Submission of Proposal, of the General Instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.
3. Canada requests that the proposal be gathered per separate electronic document (attachment) as follows:  
Section I: Technical Proposal;  
Section II: Price Proposal.
4. The electronic attachment should be labelled with the name of the section and the Solicitation Number.
5. If the Proponent is simultaneously providing copies of its proposal using the epost Connect service and facsimile, and if there is a discrepancy between the wording, the wording of the electronic copy provided through epost Connect service will take precedence.

### **2.2 Proposal by Facsimile**

1. Due to the nature of the solicitation, proposals transmitted by facsimile are not recommended for administrative reasons, but available to Proponents to provide an alternative opportunity in case of incompatibility or inability to transmit by epost Connect service.
2. If the Proponent submits its proposal by facsimile, Canada requests that the following sections be clearly identified and separated in the proposal:  
Section I: Technical Proposal;  
Section II: Price Proposal.

### **2.3 Requirement for Proposal Format**

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

1. Paper (or page) size should be - 216mm x 279mm (8.5" x 11")
2. Minimum font size - 11 point Times or equal
3. Minimum margins - 12 mm left, right, top, and bottom
4. One (1) 'page' means one side of a 216mm x 279mm (8.5" x 11") sheet of paper
5. 279mm x 432mm (11" x 17") papers (or pages) for spreadsheets, organization charts etc. will be counted as two pages.
6. The order of the proposals should follow the order of the Request for Standing Offer SRE 3 section.

### **2.4 Page Limitation**

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

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

- Covering letter
- Cover page
- Tab/Dividers used to solely identify the sections of the proposal, provided they are free of all other text and/or graphics
- Table of Contents
- Integrity Provisions - Required Documentation
- Front page of the Request for Standing Offer document
- Front page of revision(s) to the Request for Standing Offer document
- Declaration/Certifications Form (Appendix A)
- Price Proposal Form (Appendix B)
- Team Identification (Appendix C)

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

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

### **3.1 MANDATORY REQUIREMENTS**

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

#### **3.1.1 Declaration/Certifications Form**

Proponents must complete, sign and submit the following:

- Appendix A, Declaration / Certifications Form as required.

#### **3.1.2 Licensing, Certification or Authorization**

The Proponent shall be authorized to provide Interior Design services and must include an Interior Design license, or eligible to be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial or territorial law in the province of Ontario and Québec. If the Proponent is licensed to practice in only one of the two provinces then that Proponent must be eligible and willing to be licensed in the province in which they are not licensed.

You must indicate current license or how you intend to meet the provincial licensing requirements. If such information is not submitted with the proposal, Canada will provide a timeframe by which it must be

provided. Failure to provide the requested information within the specified timeframe will render the proposal non-responsive.

### 3.1.3 Integrity Provisions – Required documentation

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

### 3.1.4 Consultant Team Identification

The core Consultant Team to be identified at the time of the submission must include the following:

#### Consultant Team Identification

Proponent (prime consultant)	Interior Designer / Architect
Key Sub-Consultants/Specialists	Mechanical Electrical Engineer Cost Specialist Scheduler Sustainability Specialist

## 3.2 RATED REQUIREMENTS

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

General statements that do not clearly address the specific criteria or simply repeat content within the solicitation will not receive the same amount of consideration nor earn as favorable scores as compared to responses which clearly address the criteria with specific, detailed statements.

### 3.2.1 Comprehension of the Scope of Services

1. *What we are looking for:*  
A demonstration of the understanding of the overall requirements for services, as described in the Standing Offer Brief, including specific deliverables, expected approaches, technical expectations, and coordination requirements, especially in delivering government projects.
2. *What the Proponent should provide:*
  - a) scope of services - detailed list of services;
  - b) summary of your proposed typical work breakdown structure, i.e. resources assigned, time schedule, level of effort;
  - c) broader goals (federal image, sustainable development, sensitivities);
  - d) risk management strategy;
  - e) project management approach to working with PWGSC (understanding of PWGSC management structure, Client environment, standing offer process, working with the government in general);

### 3.2.2 Team Approach / Management of Services

1. *What we are looking for:*  
How the team will be organized in its approach and methodology in the delivery of the Required Services.
2. *What the Proponent should provide:*  
A description of:
  - a) Roles and responsibilities of key personnel;
  - b) Assignment of the resources and availability of back-up personnel;
  - c) Management and organization (reporting structure);
  - d) The firm's approach to responding to the individual call-ups which will arise as a result of this standing offer;
  - e) The design technologies which the firm will apply to develop design documents;
  - f) Quality control techniques and coordination of the design work between all required disciplines;
  - g) Cost control techniques
  - h) Communication strategies
  - i) How the team intends to meet the 'Project Response Time Requirements';
  - j) Conflict resolution methods.
  - k) Involvement of senior personnel in key positions from Proponent, sub-consultant and specialist, showing that that have a demonstrated track record of working together in integrated teams.

### 3.2.3 Past Experience, Proponent

1. *What we are looking for:*  
Demonstration that over the past five (5) years the Proponent has participated in a range of projects requiring a full scope of services in accordance with the Required Services (RS) section.  
  
The projects should be comparable in terms of the dollar value to a range of 60% to 100% of the maximum Call-Up limit of this particular standing offer. Projects involving special characteristics or design challenges should be noted.
2. *What the Proponent should provide:*
  - a) A brief description of a maximum of three (3) significant government or institutional projects undertaken within the last five (5) years by the firm and completed as a minimum, up to tender document stage. Only the first 3 projects listed in sequence will receive consideration and any others will receive none as though not included. At least one project should be a study/report/ analysis type of project. At least one project should be an office and/or multi-purpose project.
  - b) Include the names of senior personnel and project personnel who were involved as part of the project team and their respective roles and responsibilities;
  - c) Indicate the start-up date and completion date for the listed projects;
  - d) Total usable square metres;
  - e) Initial and final construction costs and explain the variance if applicable  
**Note:** For study/report/analysis projects, provide a Class 'D' Estimate only.
  - f) Scope of services rendered, project objectives, constraints and deliverables;
  - g) Design challenges and creative and innovative design solutions, especially those which demonstrate a holistic approach to workplace design;
  - h) Sustainable design experience;
  - i) Photographs or graphic illustrations;

- j) Techniques used to ensure an effective consultative process;
3. The Proponent must have participated in the above projects in the capacity of either the consultant (being in direct contract with the owner) or sub-consultant (being a sub-consultant to the consultant in direct contract with the owner). Past project experience from entities other than the Proponent or from the Proponent in a capacity other than those specified above will not be considered in the evaluation unless these entities form part of a joint venture Proponent.
  4. The Proponent should indicate those projects which were carried out in joint venture and the responsibilities of each of the involved entities in each project.

### **3.2.4 Past Experience, Sub-Consultant / Specialists**

#### **Mechanical and Electrical Sub-Consultants**

1. *What we are looking for:*  
Sub-consultants and specialists should demonstrate that, over the past five (5) years that they have participated in a range of studies/reports/analysis projects, and design and construction projects requiring a full scope of services in accordance with the Required Services (RS) section. The projects should be comparable in terms of the dollar value to a range of 60% to 100% of the maximum Call-Up limit of this particular standing offer. Projects involving special characteristics or design challenges should be noted.
2. *What the Proponent should provide:*  
A description of:
  - a) For each sub-consultant/specialist, provide a brief description of a maximum of two (2) significant projects with one (1) project being a government or institutional project and one (1) project being either a study/report/analysis type project or an office and/or multipurpose project. Only the first 2 projects listed in sequence (per sub-consultant) will receive consideration and any others will receive none as though not included.  
  
**Provide:**
    - (i) Two (2) electrical engineering projects
    - (ii) Two (2) mechanical engineering projects
  - b) Include the names of senior personnel and project personnel who were involved as part of the project team and their respective roles and responsibilities;
  - c) Indicate the start date and the completion date for the listed projects;
  - d) Total usable square metres;
  - e) The initial and actual final construction costs of applicable discipline and explain the variance; Note: For study/report/analysis projects, provide a Class 'D' Estimate only.
  - f) Scope of services rendered, project objectives, constraints and deliverables;
  - g) Design challenges and creative and innovative design solutions, especially those which demonstrate a holistic approach to workplace design;
  - h) Sustainable design experience;
  - i) Participation in efforts to ensure an effective consultative process;

#### **Cost, Scheduler, Sustainability Specialists**

1. *What we are looking for:*

Sub-consultants and specialists should demonstrate that, over at least the past five (5) years that they have participated in a range of studies/reports/analysis projects, and design and construction projects requiring a full scope of services in accordance with the Required Services (RS) section. The projects should be comparable in terms of the dollar value to a range of 60% to 100% of the maximum Call-Up limit of this particular standing offer. Projects involving special characteristics or design challenges should be noted.

2. *What the Proponent should provide:*

- a) For each sub-consultant/specialist, provide a brief description of a maximum of two (2) significant projects with one (1) project being a government or institutional project and one (1) project being either a study/report/analysis type project or an office and/or multipurpose project. Only the first 2 projects listed in sequence (per sub-consultant) will receive consideration and any others will receive none as though not included.

**Provide:**

- (i) Two (2) cost specialist projects
  - (ii) Two (2) scheduler projects
  - (iii) Two (2) sustainability specialist projects
- b) Include the names of senior personnel and project personnel who were involved as part of the project team and their respective roles and responsibilities;
- c) Indicate the start date and the completion date for the listed projects;
- d) Total usable square metres;
- e) The initial and actual final construction costs and explain the variance;  
**Note:** For study/report/analysis projects, provide a Class 'D' Estimate only.
- f) Scope of services rendered, project objectives, constraints and deliverables;
- g) Design challenges and creative and innovative design solutions, especially those which demonstrate a holistic approach to workplace design;
- h) Sustainable design experience; and
- i) Participation in efforts to ensure an effective consultative process.

### 3.2.5 Project Personnel Expertise and Experience

1. *What we are looking for:*

A demonstration that the Key Personnel have project personnel in-house with the capability, capacity and expertise to provide the required services and deliverables listed in the Required Services (RS) section.

2. *What the Proponent should provide:*

- a) Submit a maximum of three (3) curricula vitae for the prime consultant,
- b) Submit a maximum of three (3) curricula vitae for the mechanical engineering consultants
- c) Submit a maximum of three (3) curricula vitae for the electrical engineering consultants;
- d) Submit one (1) curriculum vita, for the cost specialist, scheduler and sustainability specialist.
- e) These curricula vitae must clearly indicate the years of experience which each of the personnel has in the provision of the services specified in the Required Services (RS) section;
  - a. Identify the personnel's years of experience in the profession and with the firm;



- b. Professional accreditation (if applicable);
  - c. Accomplishments / achievements / awards.
- 3. In-house personnel means personnel within the Proponent's organization (see definition of Proponent in General Instructions GI 1). Past expertise and experience of personnel not within the Proponent's (or joint venture Proponent's) organization will not be considered in the evaluation.

### 3.2.6 Hypothetical Projects

1. *What we are looking for:*

Describe the approach and methodology that you would employ to solve the problem(s) posed, in a written response only. State the overall philosophy and the way the services are to be delivered. We will assess the thoroughness of the firm's understanding and the suitability of the services offered by the firm to meet the scope of the problem.

The clarity of the report writing will form part of the evaluation (use of language, document structure, conciseness and completeness of the response).

2. *What the Proponent should provide for each hypothetical project:*

- a) description of the approach and methodology that you would employ to solve the problem;
- b) summary of your proposed work breakdown structure, i.e. scope of work, resources assigned, time schedule, level of effort in terms of number of hours of all identified resources;
- c) appropriateness of assigned resources;
- d) level of effort;
- e) project management approach to working with PWGSC (understanding of PWGSC management structure, CSU/Client environment, standing offer process, working with the government in general);
- f) problem-solving methodology (client involvement, PWGSC involvement, other government agency involvement, creative approaches to solving problems).

Calculation of a fee for the provision of these services is not required.

3. *The Facts:*

When responding to the following hypothetical fact situations, be advised that the hypothetical is to be used for evaluation purposes only. Areas and details in the hypothetical are provided only to give the Proponent sufficient material from which to develop an outline of their approach and methodology to the resolution of the issues.

### **Hypothetical Project**

#### **Background:**

Your firm has been hired through the Full Service Interior Design Standing Offer as PWGSC requires a Registered Interior Designer/Licensed Architect to lead and manage a team of consultants to develop a Functional Program, Design Concept, Furniture Procurement Strategy and a Fit-up for a Government of Canada Client Department.

Currently, the Client Department is in four (4) locations in the National Capital Area but plans to consolidate into one (1) major Crown asset Headquarters Hub location in Gatineau, QC, while maintaining smaller work hubs throughout the NCA. The Client Department currently has 1200 approved

FTEs, employs 75 consultants, and consists of five (5) branches. Approximately 25% of the employees currently work remotely (home or other offices) on an occasional basis. The client hopes to modernize their workplace to be a highly innovative, accessible, inclusive, flexible, team-based environment with a variety of different workpoints, based on the GCworkplace Design Guidelines and the Government of Canada Fit-up Standard.

The client's mandate is focused on delivering innovative technology solutions to other government departments in the NCA. Other special requirements include:

- a) Personnel working on project teams delivering technical services within the NCA
- b) Team Leaders who frequently travel to meet with other departmental representatives
- c) Call Centre for trouble-shooting and service calls
- d) Litigation and Finance policy personnel
- e) High Security Lab area, segregated from general office space
- f) Special Purpose Space (500m<sup>2</sup> total)
- g) Minister and Deputy Minister Suites

Your firm is about to submit the 99% Functional Program for review, and the client advises the project team that the organization has recently been reorganized from a Regional service model to a National service model. New programs will need to be developed as a result; it is anticipated that the size of the department will grow by 20% in order to deliver this mandate.

#### Documentation:

The following documentation is being made available:

- a) Building Capability Report;
- b) Global Threat and Risk Assessment;
- c) As-built drawings; complete sets of original Architectural/Interior Design, M&E, Structural;
- d) Government of Canada Fit-up Standards (for GCworkplace)

The Proponent may make assumptions in regards to the type and adequacy of information contained in the above documentation.

#### Requirement:

The requirement is for the delivery of a Functional Program, a furniture procurement strategy (using the Government of Canada procurement tools and methodology), and an Interior Design Fit-up Project.

#### Services Required

Find a creative approach to design the office space of the Federal Government Office. Outline the methodology and approach that your Firm/Team would propose for providing an innovative modern workplace that meets the Client's functional requirements while providing a safe, healthy and highly productive work environment. Describe the general look and feel of the proposed design. Your answer should demonstrate how well you know your Client (GOC).

Prepare a furniture procurement strategy package (based on the hypothetical design layout) underlying how each type of furniture will be procured using Government of Canada procurement tools and methodology (listing deliverables and timelines).

Note: The proponent should create and state assumptions based on a hypothetical description and to demonstrate their abilities in monitoring a typical project schedule and to indicate that they understand how a project is delivered.

Prepare a Fees and Services Proposal (using the hourly rates listed below) for this Hypothetical Requirement which demonstrates an understanding of:

1. Underlying strategic importance of these deliverables;
2. GoC and PWGSC initiatives, goals, objectives and ways of doing business;
3. Methodology;
4. How/why your proposal will bring value to the Crown; and
5. How the PWGSC Consultant Standing Offer Call-Up process works.

The Proponent should address this as a two-part question:

1. Philosophical /Strategic Statement.
2. Fees & Services Proposal for SO Call-Up.

Assume a maximum total fee in accordance with SP4 and SP5.

Use the following hourly rates for all disciplines:

- |    |              |          |
|----|--------------|----------|
| 1. | Principal    | \$100/hr |
| 2. | Senior       | \$75/hr  |
| 3. | Intermediate | \$60/hr  |
| 4. | Junior       | \$50/hr  |

Weight factor percentages in the Price Proposal Form are representative of what PWGSC would expect in terms of type of team structure for a typical project.

### 3.3 EVALUATION AND RATING

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

Criterion	Weight Factor	Points Achieved	Technical Rating
Comprehension of the Scope of Services	1.0	0 - 10	0 - 10
Team Approach / Management of Services	1.5	0 - 10	0 - 15
Past Experience, Registered Interior Design / Licenced Architect	1.5	0 - 10	0 - 15
Past Experience, Sub-Consultants / Specialists	1.5	0 - 10	0 - 15
Project Personnel Expertise and Experience	2.0	0 - 10	0 - 20
Hypothetical Projects	2.5	0 - 10	0 - 25
<b>Total</b>	<b>10.0</b>		<b>0 - 100</b>

**Generic Evaluation Table**

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

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

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

#### SRE 4 BASIS OF SELECTION

1. To be declared responsive, a proposal must:
  - a. Comply with all the requirements of the solicitation;
  - b. Meet all mandatory criteria; and
  - c. Achieve a minimum Technical Rating of sixty (60) out of the hundred (100) points available.
2. All responsive price proposals which are greater than 35 percent above the average price will cause their respective complete proposals to be set aside and receive no further consideration. An average price is determined by adding all of the responsive Proponents' price proposals together and dividing the total by the number of price proposals being opened.
3. To establish the Technical Score; each responsive proposal's total Technical Rating from SRE 3 (out of the 100 available points) will be multiplied by 90%.
4. To establish the Price Score; each responsive proposal's total price will first be prorated against the lowest evaluated total price, which will determine the Price Rating, which is then multiplied by 10% as per the table below.
5. For each responsive proposal, the Technical Score and the Price Score will be added to determine its Total Score.
6. Basis of Selection: The proposals will be ranked in order from the highest Total Score to lowest Total Score. The proponents submitting the highest ranked proposals will be recommended for issuance of a standing offer. In the case of a tie, the Proponent submitting the lower price for the services will be selected. Canada reserves the right to issue up to five (5) Standing Offers.
7. Neither the responsive proposal obtaining the highest Technical Rating nor the one with the lowest Price Rating will necessarily be accepted.

The table below illustrates an example where all three proposals are responsive. The total available points equals 100 and the lowest evaluated price is \$8,850.00.

		Proponent 1	Proponent 2	Proponent 3
	Technical Rating	65 out of 100	70 out of 100	78 out of 100
	Total Price	\$9,850.00	\$8,850.00	\$10,500.00
Calculation of Ratings	Technical Rating	65	70	78
	Price Rating	$8850/9850 \times 100 = 89.8$	$8850/8850 \times 100 = 100$	$8850/10500 \times 100 = 84.2$
Calculation of Scores	Technical Score	$65 \times 90\% = 58.5$	$70 \times 90\% = 63$	$78 \times 90\% = 70.2$
	Price Score	$89.8 \times 10\% = 8.98$	$100 \times 10\% = 10$	$84.2 \times 10\% = 8.42$
Total Score		67.48	73	78.62

Rank	3 <sup>rd</sup>	2 <sup>nd</sup>	1 <sup>st</sup>
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## SRE 5 SUBMISSION REQUIREMENTS - CHECKLIST

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

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

- ☐ Integrity Provisions – Required documentation – **as applicable**, in accordance with General instructions to Proponents (GI 1), Integrity Provisions – Proposal, **section 3**
- ☐ Proposal
- ☐ Front page of Request for Standing Offers
- ☐ Front page of Revision(s) to Request for Standing Offers
- ☐ Declaration/Certifications Form - completed and signed form (provided in Appendix A)
- ☐ Team Identification (Appendix C)

For epost Connect Proposal:

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

# **APPENDIX A**

## **Declaration/Certifications Form**

**Declaration/Certifications Form (page 1 of 5)**

**Name of Proponent:**

**Street Address:**

**Mailing Address** (if different than street address)

**City:**

**City:**

**Prov./Terr./State:**

**Prov./Terr./State:**

**Postal/ZIP Code:**

**Postal/ZIP Code:**

**Telephone Number:** (    )

**Fax Number:** (    )

**E-Mail:**

**Procurement Business Number:**

---

**Type of Organization**

\_\_\_ Sole Proprietorship

\_\_\_ Partnership

\_\_\_ Corporation

\_\_\_ Joint Venture

**Size of Organization**

Number of Employees \_\_\_\_\_

Graduate Architects/Prof. Engineers: \_\_\_\_\_

Other Professionals \_\_\_\_\_

Technical Support \_\_\_\_\_

Other \_\_\_\_\_



## Declaration/Certifications Form (page 2 of 5)

### Federal Contractors Program for Employment Equity - Certification

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

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

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

Complete both A and B.

A. Check one of the following:

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

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

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

**OR**

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

B. Check only one of the following:

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

**OR**

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

## Declaration/Certifications Form (page 3 of 5)

### Former Public Servant (FPS) - Certification

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

### Definitions

For the purposes of this clause,

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

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

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

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

### Former Public Servant in Receipt of a Pension

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

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

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

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

## **Declaration/Certifications Form (page 4 of 5)**

### **Work Force Adjustment Directive**

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

If so, the Proponent must provide the following information:

1. name of former public servant;
2. conditions of the lump sum payment incentive;
3. date of termination of employment;
4. amount of lump sum payment;
5. rate of pay on which lump sum payment is based;
6. period of lump sum payment including start date, end date and number of weeks;
7. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

**Declaration/Certifications Form (page 5 of 5)**

**Name of Proponent:**

\_\_\_\_\_

**This Declaration forms part of the offer.**

Education, Professional Accreditation and Experience:

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

**DECLARATION:**

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

**Name (print):** \_\_\_\_\_

**Capacity:** \_\_\_\_\_

**Signature** \_\_\_\_\_

**Telephone Number:** (    ) \_\_\_\_\_

**Fax Number:** (    ) \_\_\_\_\_

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

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

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

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

END OF DECLARATION/CERTIFICATIONS FORM

## **APPENDIX B**

### **Price Proposal Form**

## **APPENDIX B – PRICE PROPOSAL**

### **INSTRUCTIONS**

1. Complete price proposal and as per GI 10.
2. Proponents are not to alter or add information to the form.
3. In order to ensure that fair and competitive hourly all-inclusive rates are received for each of the positions listed, the following requirement must be strictly adhered to:
  - a. Proponents must provide an hourly all-inclusive rate for each listed position.
  - b. In the event that the firm consists of fewer personnel than listed, provide an hourly all-inclusive rate that corresponds with each position listed.
  - c. The all-inclusive hourly rate is applicable to both normal working hours and any other shift work as required.
  - d. Within each resource category, the all-inclusive hourly rates provided must demonstrate a level of salary progression reflective of the seniority of the resource. For example, the hourly all-inclusive rate of a Partner or Principal must be equal to or greater than the hourly all-inclusive rate of the senior personnel, senior personnel must be equal to or greater than the hourly all-inclusive rate of the intermediate personnel and the hourly all-inclusive rate of an intermediate personnel must be equal to or greater than the hourly all-inclusive rate of the junior personnel within each category.
  - e. The hourly all-inclusive rate for any given category of personnel cannot be \$0 or nil value.

Failure to insert an hourly all-inclusive rate for each position listed will render your proposal non-responsive.

4. The Proponent shall provide a single fixed hourly all-inclusive rate for each category of personnel listed.
  - a. Fixed hourly all-inclusive rate for each category of personnel of the Consultant and Sub-Consultant & Specialists provided by the offeror will be used for years 1 and 2 of the Standing Offer;
  - b. Year 3 will be determined by using the rates provided for years 1 and 2 adjusted by a percentage increase of 2.0%;
  - c. If exercised, Option year 1 rates, will be determined by using the rates provided for year 3 adjusted by a percentage increase of 2.0%;;
  - d. If exercised, Option year 2, will be determined by using Option year 1 rates adjusted by a percentage increase of 2.0%.
5. Travel and Living Expenses: Firms are advised that any travel time and travel-related expenses associated with the delivery of services within a 50 km radius of Parliament Hill are to be calculated as an integral part of the hourly rates. For delivery of services outside of this 50 km radius, travel-related expenses will be paid (with prior approval of the Departmental Representative) in accordance with current National Joint Council Travel Directive (<https://www.njc-cnm.gc.ca/s3/en>).
6. Training: Firms are advised that all training time is to be calculated as an integral part of the hourly all-inclusive rates, for all training provided by PWGSC.

In the event of a mathematical error, refer to GI 10.1.6.

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

Address: \_\_\_\_\_  
\_\_\_\_\_

**Table A – Interior designer and/or Architect**

<b>Personnel</b>	<b>Weight Factor (X)</b>	<b>Fixed Hourly Rate (all inclusive) (Y)</b>	<b>Total (X * Y)</b>
Partner or Principals of the firm	<b>10</b>	\$	\$
Senior Personnel	<b>40</b>	\$	\$
Intermediate Personnel	<b>30</b>	\$	\$
Junior Personnel	<b>20</b>	\$	\$
Total:			\$ <b>(A)</b>

**Table B – Mechanical Engineer**

<b>Personnel</b>	<b>Weight Factor (X)</b>	<b>Fixed Hourly Rate (all inclusive) (Y)</b>	<b>Total (X * Y)</b>
Partner or Principals of the firm	<b>10</b>	\$	\$
Senior Personnel	<b>40</b>	\$	\$
Intermediate Personnel	<b>30</b>	\$	\$
Junior Personnel	<b>20</b>	\$	\$
Total:			\$ <b>(B)</b>

**Table C – Electrical Engineer**

<b>Personnel</b>	<b>Weight Factor (X)</b>	<b>Fixed Hourly Rate (all inclusive) (Y)</b>	<b>Total (X * Y)</b>
Partner or Principals of the firm	10	\$	\$
Senior Personnel	40	\$	\$
Intermediate Personnel	30	\$	\$
Junior Personnel	20	\$	\$
Total:			\$ (C)

**Table D – Cost Specialist**

<b>Personnel</b>	<b>Weight Factor (X)</b>	<b>Fixed Hourly Rate (all inclusive) (Y)</b>	<b>Total (X * Y)</b>
Partner or Principals of the firm	10	\$	\$
Senior Personnel	40	\$	\$
Total:			\$ (D)



**Table E – Scheduler**

<b>Personnel</b>	<b>Weight Factor (X)</b>	<b>Fixed Hourly Rate (all inclusive) (Y)</b>	<b>Total (X * Y)</b>
Partner or Principals of the firm	<b>10</b>	\$	\$
Senior Personnel	<b>40</b>	\$	\$
Total:			\$ <b>(E)</b>

**Table F – Sustainability Specialist**

<b>Personnel</b>	<b>Weight Factor (X)</b>	<b>Fixed Hourly Rate (all inclusive) (Y)</b>	<b>Total (X * Y)</b>
Partner or Principals of the firm	<b>10</b>	\$	\$
Senior Personnel	<b>40</b>	\$	\$
Total:			\$ <b>(F)</b>

## Summary Table G

Category		Total for each category
Total for Table A		\$ (A)
Total for Table B		\$ (B)
Total for Table C		\$ (C)
Total for Table D		\$ (D)
Total for Table E		\$ (E)
Total for Table F		\$ (F)
<b>Grand Total for evaluation purposes</b>	( A + B + C + D + E + F)	\$

**Senior Resource:** A resource having a minimum of 12 years' experience delivering services of similar scope to that which is required for this standing offer required services

**Intermediate Resource:** A resource having 6 to 11 Years' experience delivering services of similar scope to that which is required for this standing offer required services

**Junior Resource:** A resource having 0 to 5 years' experience delivering services of similar scope to that which is required for this standing offer services.

**END OF PRICE PROPOSAL FORM**

## **APPENDIX C**

### **Team Identification**

## **APPENDIX C – TEAM IDENTIFICATION**

For details on this format, please see Submissions Requirements and Evaluation (SRE) in the Request for Standing Offers (RFSO).

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

### **I. Prime Consultant:**

#### **Discipline: Interior Designer and/or Architect**

Firm or Joint Venture Name: .....

.....

.....

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

#### **Discipline: Mechanical Engineer**

Firm Name: .....

.....

.....

#### **Discipline: Electrical Engineer**

Firm Name: .....

.....

.....

#### **Discipline: Cost Specialist**

Firm Name: .....

.....

**Discipline: Scheduler**

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

**Discipline: Sustainability Specialist**

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

END OF TEAM IDENTIFICATION



Public Services and  
Procurement Canada

Services publics et  
Approvisionnement Canada

Canada



Serving  
GOVERNMENT,  
serving  
CANADIANS.

# Doing Business with PWGSC Documentation and Deliverables Manual



# Contents

1	General.....	1
1.1	Effective Date .....	1
1.2	Authority .....	1
1.3	Purpose .....	1
1.4	Scope .....	1
1.5	Harmonization with Terms of Reference .....	1
1.6	Departmental Name Change.....	1
1.7	Terminology.....	1
1.8	Definitions.....	2
2	Construction Documents .....	3
2.1	General.....	3
2.2	Drawings .....	4
2.3	Building Information Modelling (BIM) .....	6
2.4	Specifications .....	6
2.5	Addenda .....	10
3	Cost Estimates .....	12
3.1	Cost Estimates Submission Formats .....	12
3.2	Classes of Cost Estimates for Construction Projects .....	12
4	Project Schedules.....	14
4.1	Schedule Format .....	14
4.2	Progress Report .....	14
Appendix A	Checklist for the Submission of Construction Documents.....	17
Appendix B	Drawings and Specifications Table of Contents Template .....	22
Appendix C	Addenda Formatting Template .....	23
Appendix D	Directory Structure and Naming Convention Standards for Construction Tender Documents..	24

## Revisions

Version	Date	Description
0.1	August 14, 2017	Draft version for consultation.
1.0	January 12, 2018	Original Issuance
1.1	January 31, 2019	Update to cost submission format, and minor corrections / updates.



# **1 General**

## **1.1 Effective Date**

January 31, 2019

## **1.2 Authority**

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

## **1.3 Purpose**

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

## **1.4 Scope**

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

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

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

## **1.6 Departmental Name Change**

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

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

## **1.7 Terminology**

This document utilizes the following terminology:

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

## 1.8 Definitions

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

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

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

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

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

## 2 Construction Documents

### 2.1 General

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

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

#### 2.1.1 Principles of PWGSC Contract Documents

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

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

#### 2.1.2 Translation

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

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

#### 2.1.3 Construction Documents Definitions

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

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

#### 2.1.4 Quality Assurance

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

### 2.1.5 Quality Assurance Deliverables

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

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

### 2.1.6 Terminology & Quantities

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

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

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

### 2.1.7 Units of Measure

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

## 2.2 Drawings

### 2.2.1 General

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

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

### 2.2.2 Information to be Included

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

### 2.2.3 Title Blocks and Revision Notes

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

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

## 2.2.4 Drawing Numbers

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

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

## 2.2.5 Presentation Requirements

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

## 2.2.6 Legends

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

## 2.2.7 Schedules and Tables

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

## 2.2.8 North Arrow

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

## 2.2.9 Drawing Symbols

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

## 2.2.10 As-Built Drawings

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

## 2.2.11 Submission Format

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

### **2.2.11.1 Drawing Hard Copy Deliverable Format**

Drawing submitted in hard copy shall be:

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

### **2.2.11.2 Drawing Electronic Copy Deliverable Format**

Drawing submitted electronically shall be provided:

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

## **2.3 Building Information Modelling (BIM)**

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

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

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

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

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

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

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

## **2.4 Specifications**

### **2.4.1 National Master Specification**

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

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

## **2.4.2 Index**

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

## **2.4.3 Specification Organization**

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

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

## **2.4.4 Standards**

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

## **2.4.5 Specifying Materials**

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

### **2.4.5.1 Alternate Products and Materials**

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

### **2.4.5.2 Sole Sourcing**

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

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

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

Designated Contractor

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

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

Designated Contractor

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

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

## Materials

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

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

### Acceptable Materials

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

## 2.4.6 Measurement for Payment

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

### 2.4.6.1 Unit Prices

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

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

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

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

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

## 2.4.7 Cash Allowances

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

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

## 2.4.8 Warranties

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



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

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

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

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

#### **2.4.9 Miscellaneous Requirements**

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

#### **2.4.10 Specification Coordination**

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

#### **2.4.11 Regional Guide**

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

#### **2.4.12 Health and Safety**

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

#### **2.4.13 Subsurface Investigation Reports**

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

Subsurface Investigation Report(s)

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

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

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

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

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

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

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

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

#### **2.4.15 Contracting Issues**

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

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

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

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

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

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

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

Specifications submitted electronically shall be:

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

### **2.5 Addenda**

#### **2.5.1 Format**

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

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

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

### **2.5.2 Content**

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

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

## **3 Cost Estimates**

### **3.1 Cost Estimates Submission Formats**

#### **3.1.1 Format**

Construction cost estimates for projects shall be prepared in elemental format, in accordance with UniFormat as issued by Construction Specifications Canada and the Construction Specifications Institute.

#### **3.1.2 Contents**

All cost estimates shall contain the following:

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

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

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

### **3.2 Classes of Cost Estimates for Construction Projects**

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

#### **3.2.1 Class D (Indicative) Estimate**

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

#### **3.2.2 Class C Estimate**

Based on schematic/conceptual design and/or comprehensive list of project requirements, this estimate shall be adequately detailed and shall be sufficient for making the correct investment decision. This cost estimate shall be based on measured quantities of all items of work and prepared in elemental analysis format. The level of accuracy of a Class C cost estimate shall be such that no more than a 15% design allowance is required.

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

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

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

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

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

## 4 Project Schedules

### 4.1 Schedule Format

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

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

### 4.2 Progress Report

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

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

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

#### 4.2.1 Executive Summary

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

#### 4.2.2 Narrative Report

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

#### 4.2.3 Variance Report

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

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

#### 4.2.4 Criticality Report

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

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

#### 4.2.5 Exception Report

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

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

The exception report shall be provided in the following format:

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

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

#### **4.2.6 Master Schedule**

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

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

#### **4.2.7 Detailed Project Schedule**

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

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



## Appendix A Checklist for the Submission of Construction Documents

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

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

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

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

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

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

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

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

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

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

# Appendix B Drawings and Specifications Table of Contents Template

## B.1 General

List all drawings by number and title.

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

## B.2 Sample Table of Contents

-----

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

-----

### DRAWINGS:

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

### SPECIFICATIONS:

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

---

## Appendix C Addenda Formatting Template

### C.1 Instructions

To re-issue a drawing with an addendum:

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

To re-issue a specification with an addendum:

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

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

### C.2 Sample Addendum

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

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

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

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

#### **DRAWINGS:**

- 1 A1 Architecture  
.1

#### **SPECIFICATIONS:**

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

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

## **D.1 Electronic Submissions**

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

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

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

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

## **D.2 Directory Structure**

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

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

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

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

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

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

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

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



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

## - Y

Where:

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

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

For the “Drawings - Dessins” folder:

## = Y - Z

Where:

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

Y = the English title of the folder

Z = the French title of the folder

Example:

04 - Electrical – Électrique

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

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

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

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

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

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

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

## - Y

Where:

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

Y = the title of the folder

Example:

## 02 – Divisions

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

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

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

## D.2.6 Directory Structure Example

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

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

## D.3 Naming Convention for PDF Files

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

### D.3.1 Drawing File Names

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

X### - Y

Where:

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

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

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

Example:

A001 - First Floor Details

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

The following important points about drawings are to be noted:

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

### **D.3.2 Specifications**

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

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

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

## - Y

Where:

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

Y = Name of the document

Example:

01 – Drawings and Specifications Index

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

The specifications divisions must be named as follows:

Division ## - Y

Where:

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

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

Example:

Division 05 – Metals

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

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

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

Project Number / Numéro de projet

Project Title / Titre du projet

Documents for Tender / Documents pour appel d'offres

Disk X of/de X

Example:

Project 123456 / Projet 123456

Repair Alexandra Bridge / Réparation du pont Alexandra

Documents for Tender / Documents pour appel d'offres

Disk 1 of/de 1