

# **ANNEX A**

## **STATEMENT OF WORK**

**PROJECT SERVICES FOR OFFICE FIT-  
UPS AND LIGHT BASE BUILDING WORK**

**PUBLIC WORKS AND GOVERNMENT  
SERVICES CANADA  
(PWGSC)**

# Annex A – Statement of Work

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## 1 Background

### 1.1 The PWGSC Real Property Role

- 1.1.1 Pursuant to the Department of Public Works and Government Service Act, and as stated in the Treasury Board Policy on the Management of Real Property, PWGSC acts as a common services provider to the Government of Canada. PWGSC plays an important role in the daily operations of the Government of Canada as a key provider of services for federal departments and agencies. Also, with a few exceptions, PWGSC is the designated custodian of general-purpose office accommodation in Canada, provided on an obligatory basis to departments, and sets the standards for them. PWGSC is mandated to provide federal departments and agencies with affordable office accommodation that supports the delivery of their programs and services.
- 1.1.2 PWGSC Real Property Services (RPS) has established a vision for workplace modernization that supports the Blueprint 2020 transformation in order to:
  - a. create a collaborative and innovative office environment to support knowledge-based work;
  - b. support employees' health, wellness and productivity;
  - c. increase mobility and flexibility to work from anywhere and at any time;
  - d. promote IT transformation (digitalization) to ensure access to robust information technology tools to support connectivity, collaboration, and information security; and
  - e. promote empowerment and engagement in the workforce.
- 1.1.3 RPS's vision of broad workplace modernization across the Government of Canada is now commonly known in the Government of Canada as GCworkplace. GCworkplace is part of PWGSC RPS's accommodation service offerings supporting GOC tenant office space and guiding the delivery of workplace modernization projects and solutions.
- 1.1.4 GCworkplace will require change and integration of the physical workplace, virtual environment, and behavioural under three integrated areas: People (The Back Office, Technologies (The Way We Work) and Space (The Workplace). See <https://www.tpsgc-pwgsc.gc.ca/biens-property/mt-wp/mt-wp-eng.html>
- 1.1.5 Workplace modernization and its transformation is driven by a physical space modernization and its integration with the virtual (information technology and information management) and behavioural (people and culture) environments and grounded in the tenant departments' organizational objectives for cultural transformation and modernization. This new way of working will touch every employee, and will require integration and transformation of space, technology and people to develop an integrated workplace that supports a productive work environment that incorporates systems, processes, policies, tools, training, and skills developments.

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- 1.1.6 The vision for the tenant's workplace modernization is aligned to the Activity Based Workplace, commonly defined in the private sector as a workplace which provides freedom, flexibility, and choice to employees in a variety of settings, aimed to encourage empowerment, wellness, and engagement. A variety of work settings includes different types of Workpoints, ministerial, deputy head and quasi-judicial accommodations, support space, and special purpose space within the workplace.
- 1.1.7 PWGSC Real Property Services (RPS) is accountable for providing the strategic oversight and leadership necessary for the adoption and integration of the renewed accommodation vision, solutions and concepts that promotes government-wide workplace renewal into business lines and supports the well-being, wellness and productivity of employees. Further, the renewed vision intends to provide for a more engaged workforce and better results for Canadians.
- 1.1.8 Project Services as described within this Statement of Work are required to support the delivery strategy for broad workplace modernization across the Government of Canada.
- 1.1.9 The Real Property Enterprise Sourcing Strategy meets government-wide real property service requirements by strategically leveraging readily available services from the private sector through enterprise level, large-scale mechanisms, while strengthening internal contract management and oversight capabilities.
- 1.1.10 The Strategy ensures RPS is equipped to respond to new and unique opportunities for collaboration and partnership for delivering new initiatives, take advantage of evolving market conditions and allow more informed choices in renewal of options on existing sourced solutions.
- 1.1.11 This is achieved through, whole-of-government focus; proactive planning for future-focused innovative solutions; feasible expansion with other levels of government and communities; a strategy that is designed to incorporate flexibility and agility; a strategy that is aligned with and informed by workforce capacity planning; and a strategy that embodies a procurement approach that includes: relational contracting; outcomes-based contracting; and performance-based contracting.

## **2 Introduction**

### **2.1 Overview of Requirements**

- 2.1.1 Project Services for Office Fit-up and Light Base Building Work is intended to deliver GCworkplace projects in crown assets in the National Capital Region. Following PWGSC's completion of its function program for the space to be fit-up, PWGSC requires the Contractor to complete the design and implement it. The Contractor's design will be based on PWGSC workplace fit-up standards, including GCworkplace Fit-up Standards, and on the PWGSC-prepared function program and its associated preliminary concept plans. Implementation consists of the supply and installation of furniture and IT equipment peripherals, construction of the interior space and base building systems connections, and base building improvements where they are required. Additionally, the

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Contractor will provide relocation services should they be needed for the particular project. The Contractor must coordinate, manage and execute all construction Work. A small portion of the construction work is to be delivered by the Contractor whereas the majority of the construction work, including relocation services, is required to be performed by subcontractors to the Contractor, all of which have been subcontracted through a competitive process.

- 2.1.2 This Statement of Work sets out the Work that the Contractor must perform and reflects Canada's requirements for all integrated project services under this Supply Arrangement (SA). For each project, or grouping of projects, the specific requirements will be described in a Request for Proposal (RFP) issued to all firms that are qualified in the SA. Within this Statement of Work, the use of project or Project is understood to mean projects or Projects where not otherwise specified.
- 2.1.3 With the RFP, the relevant project information is provided via a Project Brief(s). This information will include, among other things, the preliminary concept drawings, Building Capacity Assessment Brief, associated supplied building information such as as-built drawings, and/or building information models, single-line drawings, building/equipment condition reports, studies, etc. associated with the project(s). Typically, a separate Project Brief will be provided for each project. Therefore, for Contracts consisting of multiple projects, the RFP will include a unique Project Brief for each project.
- 2.1.4 The services required significantly consist of those occurring after Project Approval and Expenditure Authority 1. Noting that PWGSC will complete Functional Programming for the project (associated with design) with this informing the Request for Proposal, the principal services required are design of interior space, design of architectural, mechanical, electrical and structural works, construction, furniture and IT equipment peripherals supply and installation, and project management.
- 2.1.5 Relocation services may be required for some projects. This may comprise of moving within the construction site itself, but also moving ancillary to the construction site such as the removal to storage of existing furniture, delivery of used furniture to the construction site, assembly of existing furniture, and the moving of tenant contents from another location to the construction site, among other arrangements.
- 2.1.6 PWGSC works in collaboration with Shared Services Canada (SSC) to scope, design and install/deploy the office technology in each fit-up project. In a typical fit-up project scenario, PWGSC's designer/consultant vendors undertake the technology design, this being subject to the relevant technical standards and specifications and under the purview of SSC, who reviews and accepts the design. The technology infrastructure, as per the resulting design, is installed by SSC's various vendors, with these vendors integrating within the construction site. Similar to the design, the installation of the technology infrastructure is overseen by SSC.
- 2.1.7 Without limiting the generality of the foregoing, details of the Work are set out in this Statement of Work under the sections listed below.

- a. Project Management

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- b. Design
  - c. Construction
  - d. Relocation
  - e. Commissioning
  - f. Integration of Associated Work by Others
  - g. Quality Management
  - h. Comply with Procurement and Contracting Requirements
  - i. Construction and Occupational Health and Safety
  - j. Environmental Protection and Sustainable Development
  - k. Stewardship of Federal Heritage Buildings
  - l. Risk Management
  - m. Change and Claims Management
  - n. Accessibility
  - o. Data and Information Management and Deliverables
  - p. Contractor Incentive Program
  - q. Performance Measurement
  - r. Social Procurement
- 2.1.8 Each section in this Statement of Work is further sub-divided under two headings – Context and Scope of Services. The Context supplies an overview of the section and important information about Canada to assist the Contractor in understanding the scope of services. The Scope of Services states the Work that the Contractor must provide to meet Canada's requirements.
- 2.1.9 The services must be provided in accordance with the latest versions of acts, regulations, standards and other relevant documents as found in each section of this Statement of Work.
- 2.1.10 Canada regards the use of the private sector for the project services as a business relationship in which the parties work together in an environment of mutual respect and trust. The Contractor must maintain a cooperative and professional approach when liaising with Canada and ensure a high level of ongoing relationship satisfaction.

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- 2.1.11 Canada requires the Contractor to propose, implement, and maintain creative and innovative approaches in the services and apply its full expertise for the benefit of Canada and Canadians.
- 2.1.12 Canada requires the Contractor to manage the quality of its services while also ensuring their cost effectiveness.
- 2.1.13 This Contract is performance-based. A regime of outcome-oriented Key Performance Indicators will be used to measure the Contractor's performance in specific areas of focus, such as on-time delivery.

### **3 Project Services**

#### **3.1 Context**

- 3.1.1 The Treasury Board Directive on the Management of Projects and Programmes requires that federal departments have appropriate internal capacity for managing projects. The objective of this policy is to ensure that the appropriate systems, processes and controls for managing projects are in place. The effective management of projects is vital in providing value for money and demonstrating sound stewardship in program delivery.
- 3.1.2 The Treasury Board Directive on the Management of Real Property brings together federal real property obligations. The objective of this policy is to ensure real property is managed in a sustainable and financially responsible manner, throughout its life cycle, to support the cost-effective and efficient delivery of government programs.
- 3.1.3 Various authorities will interact with the work including Federal authorities and authorities from other jurisdictions. For example, Provincial labour authorities also have jurisdiction over Contractors and their employees. Although the Federal Government is not formally subject to jurisdictions of other levels of government, such as municipal governments, and provincial safety authorities, voluntary (i.e. good neighbour) compliance with the requirements of these other authorities is a requirement of this contract unless otherwise directed by PWGSC.
- 3.1.4 PWGSC's project delivery methodology is based on the PMI standards which includes the Initiation, Planning, Execution, Monitoring and Close-Out. Further, PWGSC incorporates into its project management practices the Project Management Institute's (PMI) ten knowledge areas from the Body of Knowledge and adapts and aligns these to the Directive on the Management of Projects and Programmes.
- 3.1.5 To ensure that business objectives are met, the following principles are applied to PWGSC projects:
  - a. projects are planned, monitored and controlled, including management of changes in project parameters;

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- b. projects are delivered respecting scope, time and cost objectives, government legislation, policies and directives, and quality;
  - c. lessons learned are identified and shared; and
  - d. projects are closed out with project information being commissioned and handed over.
- 3.1.6 PWGSC adopts UniFormat II elemental costs format to define the quality, level of details and accuracy of the cost estimates. For purpose of this contract, cost estimates for Class C, B and A are required.
- 3.1.7 PWGSC is developing its long-term vision and strategy for the digitalization of its real property portfolio and project delivery process. Lifecycle Building Information Modeling (BIM) is the cornerstone of these efforts. PWGSC plans to adopt and implement standardized digital asset and project information production and management practices that align with the ISO 19650 series of standards (i.e. parts 1, 2, 3 and 5). Over the course of the resulting supply arrangement, as PWGSC develops its internal and outward facing guidance on information models, requirements, guidelines and standards may be integrated into this SOW and/or integrated into the work on a project by project basis.

### **3.2 Scope of Services for Project Management**

- 3.2.1 The Contractor must manage each project through all stages outlined herein including design, construction, commissioning and close-out.
- 3.2.2 The project scope includes the design, supply, and installation of furniture and provisionally IT equipment peripherals. When IT equipment peripherals are required they will be identified in the RFP/Project Brief.
- 3.2.3 The project scope includes the coordination of the work performed by others for information technology and infrastructure.
- 3.2.4 The project scope includes relocation services which is inclusive of the disassembly, storage, and assembly of existing and used furniture.
- 3.2.5 Notwithstanding the location of all scope of services found with this Statement of Work, nor whether specific linkages have or have not been made between individual services, the Contractor must ensure appropriate integration of all services.
- 3.2.6 The Contractor's personnel must 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 Work. Further the Contractor must be in possession of all valid licences, permits, registrations, certificates, declarations, filings, or other authorizations necessary to comply with all federal, provincial, and municipal laws and regulations applicable to all of the Work.

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3.2.7 The Contractor's key personnel must include a Lead Project Manager. The Lead Project Manager must:

- a) Possess an active Project Management Professional (PMP) certification or hold an active equivalent project management professional designation or certification. Alternatively, they may instead hold a master's degree in project management from a Canadian recognized post-secondary institution. A recognized post-secondary institution is defined as public or private institution that has been given authority to grant degrees, diplomas, and other credentials by a public or private act of a provincial/territorial legislature or through a government-mandated quality assurance mechanism. For greater certainty, also included are institutions authorized to grant specific academic credentials for specific academic programs.
- b) Possess the following experience:
  - i. For projects (or series of projects) delivered under this SOW with a value of up to \$20 M, 8 years managing and leading construction or fit-up projects valued at more than \$10M; and
  - ii. For projects (or series of projects) delivered under this SOW with a value of over \$20 M, 12 years managing and leading the construction or fit-up projects valued at more than \$40M.

3.2.8 The Contractor must develop and submit a Project Management Plan (DID RP3.1-PD-01), for individual projects. This plan needs to be kept up to date and resubmitted as the project evolves and will be submitted a final time at project close out.

3.2.9 The Contractor must hold progress meetings with the Technical Authority (TA) to discuss important items reported in the Project Status Report (DID RP3.1-PD-02), and issues that require immediate action and/or decision to ensure continuity of the project. The meetings must take place within the first seven (7) working days of each month. The Contractor must prepare and submit the minutes of the meeting in the Project Meeting Minutes (DID RP3.1-PD-03).

3.2.10 The Design and the Construction must be compliant with pertinent codes and standards as listed in Appendix 3 – Federal Codes and Standards of this SOW.

3.2.11 The Contractor must observe and put into practice the codes, regulations, by-laws and decisions of authorities having jurisdiction, such that:

- a. In areas of conflict between authorities, the Federal authority prevails; and
- b. In areas of conflict between specific codes, standards and regulations, whether Federal or not, where possible the most stringent requirements must be adhered to; adhere to codes, standards and regulations of other authorities having jurisdiction in the spirit of voluntary compliance.

3.2.12 The Contractor must ensure that its approach to project delivery is consistent with:

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- a. The Project Management Institute's Project Management Body of Knowledge;
  - b. Life cycle management principles by ensuring that:
    - i. all viable design and construction options are considered and ultimately designed and constructed to maintain and maximize the value of Canada's assets over their entire life cycle; and
    - ii. the structural, architectural, mechanical, electrical, heritage values and functional integrity of the assets via recommending and implementing solutions complying with the codes and standards for these components of buildings.
  - c. Sound risk management principles; and
  - d. Operational requirements specifically by respecting the tenant's work environments and minimizing disruptions and generally by ensuring that projects are delivered in accordance with the accepted project schedule.
- 3.2.13 The Contractor must manage and control expenditures through appropriate planning, measurement and revision. Cost management and control must be supported via robust cost estimating, and cost forecasting processes. Specific project cost forecasting is reported in the Project Status Report (DID RP3.1-PD-02). Further the Contractor must cooperate with the TA with respect to supporting PWGSC's project budgeting and financing process, furnishing estimates when requested.
- 3.2.14 The Contractor must provide costing and cost control services including cost estimates that are reflective of the local construction market conditions. The Contractor must prepare project cost estimates based on the latest design documentation. At a minimum, the Contractor must provide three cost estimates during the design development phase as follow:
- a. At the completion of the 33% Schematic Design, prepare a Class C level construction cost estimate;
  - b. At the completion of the 66% Detailed Design, prepare a Class B level construction cost estimate; and
  - c. At the completion of the 99% Final Design, prepare a Class A level construction cost estimate.
- The Contractor must submit the above construction costs estimates as per Construction Cost Estimates (DID RP-3.1-PD-04).
- 3.2.15 Where Work is progressed as packages the Contractor must prepare costs estimates for each individual work package.
- 3.2.16 Construction cost estimates must be updated and documented as they evolve. The Contractor must advise the Technical Authority when the accepted estimated construction cost could be exceeded and make recommendations to ensure the Work remains within the accepted estimated construction cost.

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- 3.2.17 The Contractor must prepare and maintain a project schedule, ensuring that project scheduling is accurate and adhered to throughout the project's delivery, reporting variances and their reasons in the regular project updates through the Project Status Report (DID RP3.1-PD-02). The schedule must account for all phases of the project through to project turn-over. The schedule must identify all task dependencies and task resources responsibilities. The schedule should also include all "checkpoints" associated with the Achieve On-time Performance of the Project performance priority. The Contractor must account for associated work by others, and include key activities and dates for work by others in the Contractor's schedule. In particular as it concerns information technology and infrastructure, the Contractor must account for the work of SSC's subcontractors in consultation with SSC.
- 3.2.18 In line with the invoicing instructions found in the Terms of Payment, the Contractor must submit, with the monthly invoice, form H4016C (Progress Reports) and form 9143 (Contract Plan and Report Form). Where indicated in the RFP, these forms are to be submitted for each individual project for Contracts consisting of multiple projects. Among the information to be provided via form 9143, the Contractor must provide an indication of the actual and planned costs during contract performance and identify the cash flow schedule to aid the TA in reviewing and verifying the invoices. Where the Contractor believes that information required to be given in forms H4016C and 9143 is already provided in one or more of the Contract deliverables, more specifically Project Status Report (DID RP3.1-PD-02) and Construction Cost Estimates (DID RP-3.1-PD-04), they may reference these deliverables ensuring that it is made clear in their reporting where to find the specific information.
- 3.2.19 Throughout the project the Contractor must immediately notify by email the Technical Authority of any modifications to the project which may be subject to the Technical Authority or Contract Authority approval. These modifications to the project could include significant alterations to the project scope and/or project schedule as well as increases to the initially approved project budget.
- 3.2.20 To ensure that the project risks are clearly identified and assessed, the Contractor must apply control strategies, calculate allowances, and monitor risks throughout the life of the project. The Contractor must manage risk consistent with industry best practices by assessing, documenting and managing internal and external risk and developing and implementing contingency and mitigation plans as per the section on Risk Management, and working collaboratively with the TA to jointly manage risks where warranted.
- 3.2.21 With respect to incidents, accidents, injuries, near misses, etc., the Contractor must follow the incident reporting protocol in place for the building as directed by the Building Control Authority. The Contractor must also participate in the incident's investigation and resolution as directed by the incident resolver group.
- 3.2.22 The Contractor must manage commissioning as described in Commissioning Management.
- 3.2.23 The Contractor must track and identify issues and opportunities that arise during the project and make suggestions for improvement of project processes and practices. This must be captured in the Lessons Learned Log (DID RP3.1-PD-41) at the completion of

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each phase of the project. Further, the Contractor must meet with the TA at the end of each project phase (or at least annually) to review lessons learned.

3.2.24 As it relates to project close-out, the Contractor must oversee production and assure the quality and completeness of the Work.

### **3.3 Scope of Services for Design**

#### **3.3.1 General**

- a. The Contractor or Contractor's Architect or Interior Designer must be the Architect of Record or Interior Designer of Record for the project and must bear all responsibilities and liabilities appurtenant thereto.
- b. The Contractor's key personnel must include a Lead Architect or Lead Interior Designer. The person must possess the following experience:
  - i. For projects delivered under this SOW with a value of up to \$20 M, 10 years leading a design team for construction or fit-up projects valued at more than \$10M; and
  - ii. For projects delivered under this SOW with a value of over \$20 M, 15 years leading the construction or fit-up projects valued at more than \$40M.
- c. The Contractor's key personnel must include a Lead Engineer. The Lead Engineer must possess the following experience:
  - i. For projects (or series of projects) delivered under this SOW with a value of up to \$20 M, 8 years leading a design team for construction or fit-up projects valued at more than \$10M; and
  - ii. For projects (or series of projects) delivered under this SOW with a value of over \$20 M, 12 years leading a design team for construction or fit-up projects valued at more than \$40M.
- d. The Contractor must ensure the accuracy and completeness of information and data. The Contractor must undertake their own quality control process and review, correct, and coordinate their documents between disciplines. The specific activities, tasks,

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and deliverables required of the Contractor will be further delineated in the Project Brief issued with RFPs.

- e. The design must be compliant with pertinent codes and standards as listed in Appendix 3 – Non-Exhaustive list of Acts, Regulations, Standards and other references. Of particular relevance to fit-up work are:
  - 1. For building design: The Technical Reference for Office Building Design; and
  - 2. For office space design:
    - i. The Government of Canada GCworkplace Fit-up Standards;
    - ii. The mandatory GCworkplace Design Guide (the Guide);
    - iii. The GCworkplace Space Planning Workbook (the Workbook);
    - iv. The GCworkplace Technical Reference Manual (the Manual); and
    - v. The Guide, the Workbook and associated design process tools, including the Manual, are included in the GCworkplace Design Roadmap.
- f. With respect to the quality of materials, the Contractor must design and implement projects to include materials of a quality consistent with the architectural characteristics, building design, functional use and the strategic direction for the asset.

### 3.3.2 Pre-Design Services

- a. The Contractor must review and meet with the TA and the Building Control Authority to discuss and seek any necessary clarifications on the Project Brief and the associated supplied building information such as as-built drawings, single-line drawings, building/equipment condition reports, Building Capacity Assessment Briefs, studies, etc.
- b. The Contractor must perform necessary site visits to investigate and confirm the conditions identified in the Project Brief, and the associated supplied information reports. Where necessary, the Contractor must identify updated and/or new information on existing building conditions including identifying any new conditions that warrants remedial actions or repairs to the building systems that include, but not be limited to architectural, structural, mechanical, electrical and hazardous substances. The Contractor must take note of this information and utilize it during the project.
- c. With respect to their review and investigation of the existing building information furnished by PWGSC and related site visits, the Contractor must advise the TA of any updated and/or new conditions, providing a description of each, the cause(s) of the building conditions, the probable impact to the project scope, and their recommendations to address the building conditions (re. Building Capacity Assessment Report) including the need for additional investigations or studies

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(PWGSC reserves the right to complete additional recommended work themselves). This advice to the TA must be via deliverable Pre-Design Findings Report (DID RP3.1-PD-08).

## 3.3.3 Design Development Services

- a. The Contractor must complete design development to meet the requirements for the project for all interior floor spaces and related architectural, mechanical, electrical, structural and accessibility requirements. Design development must also account for related requirements from others participating in the project, in particular for office technology by Shared Services Canada and their vendors. Design development must build upon PWGSC's schematic design and estimates derived from their Functional Programming and Preliminary Concept Plan process, and other information as provided for through PWGSC's Project Brief.
- b. The Contractor must coordinate cabling and conduit, power, HVAC and security requirements with communications and security resources including with PWGSC, SSC and their subcontractors. The Contractor must seek advice from the TA to ascertain the responsible authorities for the communications and security requirements. All of these requirements must be indicated on the drawings.
- c. The design development process must be in accordance with industry standard practice and result in drawings, building information models and specifications submissions (i.e. as a set) to match the following design development milestones descriptions:
  - i. 33% Schematic Design: Must demonstrate general intent of design and compliance and alignment with standards; a summary specification is also required, but not a full specification.
  - ii. 66% Detailed Design: Must show the full system, all components, requirements, and lack only minor details on drawings; specifications must be well advanced and contain major work and material requirements and lack only minor details.
  - iii. 99% Final Design: Lacking no detail and complete with a project specific specification.
  - iv. 100% Construction Package: This is the culmination of the design development phase and produces a signed and sealed design by the responsible design professional in compliance with provincial jurisdiction requirements; the package is ready for tendering of work packages.
- d. All sets of the above drawings and specifications must be produced for each design development milestone. Phase-specific design development packages must be submitted for 66% Detailed Design and 99% Final Design as per Deliverable Design Development Packages (DID RP3.1-PD-09).
- e. The Contractor must integrate Building Information Modeling into the design and construction processes where so directed by the TA.
- f. For some projects, where so identified in the Request for Proposal, PWGSC may request that the Contractor provide specific Work in collaboration with SSC. Where this is requested the Contractor must:

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- i. Cabling Services: Must gather requirements, develop cable plant designs, procure materials as per supply chain integrity requirements, and provide installation, validation and testing as specified in SSC's Technical Specifications. Must provide evidence that the cable design is completed by an accredited Registered Communication Distribution Designer (RCDD). Must submit the cabling design to the TA via Deliverable Design Development Packages (DID RP3.1-PD-09) which the TA will forward to SSC for review. During construction of cabling SSC will inspect the Work as well as completion.
- ii. Commercial Wi-Fi: Must gather requirements, develop designs, procure materials as per supply chain integrity requirements, and provide installation, validation and testing as specified in SSC's Technical Specifications.
- iii. In-Building Cellular Coverage Enhancement (i.e. Cellular Booster): Must gather requirements, develop designs, procure materials as per supply chain integrity requirements, and provide installation, validation and testing as specified in SSC's Technical Specifications.

### **3.3.4 Furniture and IT Equipment Peripherals**

- a. The Contractor must specify, supply and install all new furniture and, where identified in the RFP/Project Brief, IT equipment peripherals. They must ensure all furniture proposed, and ultimately selected and supplied, complies with the GCworkplace Standard Furniture Typicals, and more specifically the Furniture Specifications given in Annex F. Where IT equipment peripherals are required specifications will be provided in the RFP/Project Brief. The Contractor must ensure all IT equipment peripherals proposed, and ultimately selected and supplied, comply with these specifications.
- b. The Contractor must gather, analyse, determine and document the project's furniture and, where required, IT equipment peripherals requirements in a written and graphic format (i.e. data sheet) including, but not limited to, all workstation types and finishes, i.e. systems furniture, freestanding, soft seating and case goods, display monitors, monitor arms, uniform connection devices (i.e. docking stations and/or port replicators and screen sharing devices), and Unified Communication and collaboration devices (or AV-VC). For furniture, prepare and submit to the Technical Authority deliverable Preliminary Furniture Recommendations Report (DID RP3.1-PD-10) prior to selection of the furniture supplier(s). Where IT equipment peripherals are included, address this equipment in the Preliminary Furniture Recommendations Report.
- c. The Contractor must provide to the TA deliverable Furniture Proposal Package (DID RP3.1-PD-11) to present their proposed new furniture products following selection of the furniture supplier(s) but prior to placing the product order. This document must include all necessary specifications for the proposed furniture products.
- d. Projects may from time to time re-use existing furniture found on the Work site or existing furniture from outside the Work site. The re-use of existing furniture will be described in the Project Brief. This description may consist of quantities and their

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approximate placement. The Work required may necessitate that the Contractor survey existing furniture in PWGSC's inventory, whether on the Work site, another site, or in storage, assess viability for use within the Work, and where appropriate include it in the design. Where existing furniture is included in the Work, the Contractor must account for it in their design and construction. Where existing furniture is incorporated into the design it must be documented in the Preliminary Furniture Recommendations Report (DID RP3.1-PD-10).

### **3.3.5 Construction**

The Contractor must manage design change including additional Work occurring during construction including making necessary design revisions, detailing proposed changes for the construction subcontractors' consideration, and examining and providing an opinion on proposed change order pricing put forward by subcontractors.

### **3.3.6 Project Close-out**

- a. The Contractor must provide the final as-built drawings as described in CAD As-Built Drawings (DID RP3.1-PD-13).
- b. The Contractor must provide floor plans as described in CAD Occupancy Floor Plans (DID RP3.1-PD-14).

## **3.4 Scope of Services for Construction**

### **3.4.1 General Construction**

The Work described hereunder is applicable to all construction Work.

- 3.4.1.1 The Contractor must furnish the construction Work in accordance with the 100% Construction drawings and specification.
- 3.4.1.2 The Contractor must coordinate, manage and execute all construction Work.
- 3.4.1.3 The Contractor's key personnel must include a Lead Construction Superintendent. The Lead Construction Superintendent must possess the following experience:
  - i. For projects (or series of projects) delivered under this SOW with a value of up to \$20 M, 10 years in a superintendent role for construction or fit-up projects valued at more than \$10M; and
  - ii. For projects (or series of projects) delivered under this SOW with a value of over \$20 M, 15 years in a superintendent role for construction or fit-up projects valued at more than \$40M.
- 3.4.1.4 The Contractor must perform the role of Constructor as defined in Ontario's Occupational Health and Safety Act and Regulations for Construction Projects (Revised Statutes of Ontario, 1990 Chapter O.1, as amended) when the Work is done

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in Ontario and Principal Contractor as defined by Quebec's Act Respecting Occupational Health and Safety when the Work is done in Quebec.

- 3.4.1.5 The Contractor must deliver the Work, including Work packages where applicable, by the established and agreed completion date(s).
- 3.4.1.6 The Contractor must supply and install all furniture and, where required, IT equipment peripherals. This may also include disassembly/ assembly and relocation of existing furniture and IT equipment peripherals found within the project site or furniture from another site.
- 3.4.1.7 Following furniture installation and, where required, IT equipment peripherals the Contractor must inspect the Work and rectify all furniture deficiencies. Deficiencies are to be documented and submitted in the Furniture Deficiency Report (DID RP3.1-PD-12). Where IT equipment peripherals are included, address this equipment in the Furniture Deficiency Report.
- 3.4.1.8 The Contractor must notify the TA of the results of contact, including site visits, by authorities having jurisdiction that resulted in a warning, direction, a work stoppage, reports or the like, whether written or verbal. The notification must be made via deliverable Reports, letters, orders, etc. as a result of contact, including site visits, by authorities having jurisdiction (DID RP3.1-PD-06) and must include copies of anything in writing received from the authority.
- 3.4.1.9 The Contractor must:
  - a. conduct the Work employing industry standards, norms and best practices for budget, schedule, quality, and scope management;
  - b. inspect for, identify and correct unacceptable Work early so as to avoid delays that might arise as a result of deficient Work;
  - c. carry out Work using qualified licensed workers or apprentices in accordance with provincial legislation respecting manpower vocational training; permit employees registered in provincial apprenticeship programs to perform specific tasks for which they are qualified only under the supervision of qualified licenced workers;
  - d. arrange for and obtain all permits, certificates and inspections; and
  - e. arrange for and obtain tests as may be required.

### **3.4.2 Site Coordination and Facilitation for Construction**

The site coordination and facilitation Work described hereunder must be distinct from Construction To be Delivered by Subcontractor as described in Section 3.4.3.

- 3.4.2.1 For each project, the Contractor must:
  - a. erect and maintain temporary barriers/enclosures to isolate the Work site and protect adjacent areas, including IT and telephone room, against the spread of dust

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and dirt beyond; isolate the Work site from occupants and other workers in the federal workplace;

- b. provide temporary signage including graphic symbols related to traffic control, instructions, use of equipment, public safety devices, etc.;
- c. provide temporary services and site facilities including sanitary facilities;
- d. in coordination with the Building Control Authority, determine and enact site separation and identification in order to maintain time or space at all times;
- e. coordinate with the Building Control Authority storage, access for and movement of material and personnel in or through common elements adjacent to the Work site such as parking lots, loading docks, elevators, hallways, etc.;
- f. provide common use access and lifting equipment and associated resources such as cranes, lifts, scaffolding, etc.;
- g. manage waste and recycling for the Work site including disposal;
- h. carry out general carpentry;
- i. manage site security including verification of personnel's security clearance and site access, and coordination of site escorts;
- j. in coordination with the Building Control Authority, maintain in working condition building systems on the Work site; and
- k. coordinate and facilitate access of the Building Control Authority to the Work site in order to operate the building and building system.

### **3.4.3 Construction to be Delivered by Subcontractors**

The subcontracted construction Work described hereunder is a requirement for all construction Work with the exception of Site Coordination and Facilitation for Construction as described in Section 3.4.2.

- 3.4.3.1 All construction Work must be subcontracted by the Contractor and thus delivered by the Contractor's subcontractors. More specifically, the Work to be subcontracted includes, but is not limited to, mechanical, electrical, architectural (framing, finishing, ceilings, doors, glazing), painting, flooring, and security; with respect to office technology, the Work may also include horizontal and vertical cabling, commercial Wi-Fi and in-building cellular coverage enhancement (i.e. cellular booster) – see also Design Development Services 3.3.3 – e for more information on construction; the Work outlined here may not be applicable to each project depending on the scope of Work. The Contractor must subcontract the construction Work in parts as is customary to industry and must not subcontract the Work in one comprehensive work package.
- 3.4.3.2 The Contractor must manage its subcontractors and ensure they provide the required material and services of appropriate quality, that they adhere to accepted drawings and

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specifications, schedules and costs, all in a manner consistent with this Statement of Work and achieve timely delivery of a quality project.

3.4.3.3 The Contractor must respond to, manage and resolve disputes with its subcontractors, ensuring that these disputes do not negatively impact the Work or PWGSC.

3.4.3.4 See also Comply with Procurement and Contracting Requirements.

### **3.5 Relocation Services to be Delivered by Subcontractors**

#### **3.5.1 Context**

3.5.1.1 Projects may require that office furniture, systems, equipment, personal effects, etc. (i.e. goods) need to be relocated and or warehoused. PWGSC has Supply Arrangements in place in the NCA for relocation and warehousing services.

3.5.1.2 PWGSC may use these Supply Arrangements or the Contractor to provide relocation and short term warehousing services for the Work.

3.5.1.3 Relocation services needs will vary from project to project. Some examples of potential relocation scenarios are as follows:

- a. Relocation of goods from the project site to PWGSC or PWGSC vendor's warehouse;
- b. Relocation of goods from the project site to the Contractor's warehouse and return to the project site following construction;
- c. Relocation of goods from the project site to another office site (i.e. to swing-space) pre-construction;
- d. Relocation of goods from another office site to the project site following construction; and
- e. Relocation of goods from another office site to PWGSC or PWGSC vendor's warehouse.

3.5.1.4 Not all the goods found of the project site pre-construction will be re-used on the project site post-construction. Some or all of the goods may be declared surplus and transferred to GCSurplus. This may also be the case for goods originating from another office site.

3.5.1.5 From time to time projects may re-use the existing furniture found on the Work site or use existing furniture from another site. Therefore, the relocation of furniture is understood to include disassembly and assembly.

3.5.1.6 In all cases, for relocation or warehousing of goods Work performed by the Contractor, the goods must originate from the project site, a warehouse, or another (office or otherwise) site occupied by one or more of the tenants intended to occupy the office

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space of the Work following construction. More specifically, the Contract is not intended to relocate goods not directly associated with the project Work.

- 3.5.1.7 Short term warehousing means for no more than the duration of the Work. Warehousing will not continue beyond substantial completion of the construction Work.

### **3.5.2 Scope of Services**

- 3.5.2.1 All scope of services described herein are to be subcontracted to one or more subcontractors to the Contractor.
- 3.5.2.2 The Contractor must provide relocation services including, but not limited to, the moving of full office suites, office furniture, computers, workstation systems, office equipment, filing cabinets, computer hardware, personal effects, boardrooms, full kitchens, other workplace items such as fridges, microwaves, fax machines, files, records, etc. (herein referred to as relocated goods), and short term warehousing services for relocated goods. Relocation and warehousing services include packing, crating/boxing, disassembling, loading, transporting, unloading, unpacking, uncrating/boxing, disassembling, assembling, cleanup at the end of each move, etc. and coordination with the tenant organization which is being relocated.
- 3.5.2.3 The Contractor must provide all the resources, tools, supplied, lifting equipment, including forklifts and roller jacks, and transportation, standard to the moving industry, and necessary to perform the relocation Work properly, efficiently and safely. All must be clean and in good working order.
- 3.5.2.4 Temporary warehousing of relocated goods must be within the National Capital Area.
- 3.5.2.5 For each move the Contractor must prepare a computerized inventory list of the relocated goods. The inventory list must also state the particulars of the associated relocation (e.g. to/from, date, supervisors, etc.). The Contractor must identify in the inventory list any relocated goods found to be in damaged condition prior to the move. Any damage is to be verified by the TA prior to the item being moved. The inventory list must also be used in the case of movement of relocated goods for warehousing. In addition to the information mentioned previously, the inventory list must give the warehousing location and estimated period of storage. The TA must be granted access to warehousing facilities at all times.
- 3.5.2.6 In the event of any damage or loss attributed to the Contractor during a relocation and/or warehousing operation, the Contractor must repair or replace the relocated goods, and real property (including floor and wall finishes).
- 3.5.2.7 All relocations must be overseen by a crew supervisor. Since the Work to be performed is considered a front line function, for relocation Work taking place outside of the project Work site, personnel must display the Contractor's name or logo on their outer garment(s) for identification purposes.
- 3.5.2.8 See also Comply with Procurement and Contracting Requirements.

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## **4 Requirements Related to All Services**

The work described in the following sections is understood to supplement the services described previously (i.e. the prime services). The extent to which the individual requirements below apply to the prime services varies. For example, Quality Management applies to all prime services. On the other hand Subcontract Management only applies to the Work that this Statement of Work requires the Contractor to subcontract. Finally, some of the following requirements may be project dependant. For example, Heritage requirements will apply in Designated buildings or buildings approaching or over the threshold age that have not yet been evaluated; otherwise there is no Heritage Work in the project.

The Contractor must determine where and how Requirements Related to All Services apply to the Work and integrate them into the delivery of the Work. This includes ensuring that requirements are passed on to and adhered to by its subcontractors, as may be appropriate.

### **4.1 Commissioning of Projects**

#### **4.1.1 Context**

- 4.1.1.1 Commissioning provides a bridge between construction and operations and maintenance. It focuses on the operation of all systems as an integrated whole, and verifies the performance and interaction of all systems operating together under a full range of operating conditions. It further facilitates necessary technology transfer through proper documentation and training. Effective commissioning of projects results in reduced life cycle costs and cost-effective maintenance for PWGSC.
- 4.1.1.2 The importance PWGSC gives to commissioning is reflected in its extensive commissioning policy and standards framework which include adoption of industry standards and procedures with variances as specified. Applicable documents and references include:
  - a. PWGSC Commissioning Policy;
  - b. PWGSC Commissioning Standard, 2015;
  - c. CSA Z320-11: Building Commissioning Standard & Check Sheets;
  - d. ASHRAE 202: Commissioning Process for Buildings and Systems; and
  - e. PWGSC Commissioning Guidelines CP2-CP13, 2003.
- 4.1.1.3 The Commissioning Team is composed of the Contractor and their independent Third Party Commissioning Agent (TPCA), and the Building Control Authority. The TA's main point of contact for commissioning is the TPCA; therefore commissioning deliverables will be submitted to PWGSC by the TPCA. During commissioning, the Building Control Authority provides advice on the proposed commissioning activities and reviews

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commissioning documentation from a facility perspective, including training, equipment labelling and warranty inspections.

## **4.1.2 Scope of Services**

### **4.1.2.1 The Contractor must:**

- a. Engage through subcontract an independent Third Party Commissioning Agent to perform the functions described below. The TPCA must have a minimum of five years' direct commissioning experience, and have led the commissioning process for at least two projects of similar scope and complexity as the projects proposed to be delivered under this SOW.
- b. Establish a Commissioning Team to help guide and facilitate the implementation of the commissioning process and its associated requirements. The Building Control Authority must have an opportunity to participate fully in the commissioning process and to provide advice which must be taken into account.

### **4.1.2.2 The Contractor must undertake the following commissioning activities, at a minimum:**

- a. Coordinate all commissioning activities;
- b. Review commissioning documentation throughout the commissioning process;
- c. Implement the Commissioning Plan;
- d. Integrate project commissioning needs into the design;
- e. Develop the Commissioning Schedule
- f. Prepare manuals (Commissioning Manual and O&M Manual) and drawings;
- g. Preventative Maintenance Support System (PMSS/IMS) documentation;
- h. Prepare Start-up Procedures;
- i. Prepare Standard Operating Procedures;
- j. Undertake inspections, testing, and balancing;
- k. Prepare the training plan and program;
- l. Train end users accordingly; and
- m. Carry out start-up and performance verification activities such as demonstrations and acceptance tests of systems and equipment.

### **4.1.2.3 The Contractor's TPCA must:**

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- a. Prepare the Commissioning Brief and Commissioning Plan;
- b. Prepare commissioning specifications;
- c. Prepare and maintain an Owner's Project Requirements document;
- d. Provide input on the development of the project design from a commissioning perspective;
- e. Organize and monitor commission activities;
- f. Review and report on commissioning documentation throughout the commissioning process in reference to a Commissioning Deliverables List;
- g. Verify that commissioning activities align with the project design and post-construction operational requirements;
- h. Review the training plan and program;
- i. Certify performance of all commissioning equipment and system components;
- j. Perform quality assurance;
- k. Undertake the Product Information and Performance Verification elements including witnessing testing and performance verification; and
- l. Prepare all Commissioning Reports in conformity with the PWGSC Commissioning Guidelines; the final Commissioning Report must include an Issues and Resolution log.

4.1.2.4 The Contractor must provide to the TA commissioning documents as described in the deliverable Commissioning (DID RP3-1-PD-34).

### **4.2 Integration of Associated Work by Others**

#### **4.2.1 Context**

- 4.2.1.1 Other Government Departments and agencies (OGD's) may support PWGSC in the delivery of real property projects. For example, Shared Services Canada (SSC) provides information technology, infrastructure design, materials and installation for office fit-up projects and would be expected to participate in some capacity in all the projects.
- 4.2.1.2 Canada engages third-party contractors to support their real property operations and related work. For example, SSC leverages various third-party contractors to supply and install infrastructure including: WAN, LAN, cabling, GOC and commercial Wi-Fi, cyber and IT security, telecommunication services, local internal access, distributed antenna systems and in-building cellular enhancement. Given this, third-party contractors may

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participate in some capacity in the projects, including within the design development phase.

- 4.2.1.3 Some third-party contractors may exercise administrative and oversight roles in relation to the Contractor on behalf of Canada. Most notably, this applies to the Building Control Authority role when exercised by a third-party contractor. Canada may also issue separate contracts to assist with contract oversight during any phases of the work. These consultants, on behalf of Canada, may be involved in quality assurance, construction estimate review, cost estimation review and verification, review and validation of design submissions, etc.
- 4.2.1.4 The Building Control Authority is the crown's on-site representative responsible for building operations. The Building Control Authority role may be fulfilled by PWGSC, by an OGD custodian, a landlord, or by a third-party contractor acting on behalf of PWGSC and/or the OGD custodian. Building Control Authorities are delegated certain responsibilities on behalf of PWGSC, including controlling access to assets with respect to operations, maintenance and construction, among others. More specifically the Building Control Authority (BCA):
  - a. assumes care, control, custody and coordination of all operations (building management and project execution) within a building;
  - b. validates that provisions in the Contractor generated Site-specific Health and Safety Plan align with the building OHS plan and are adequate to cater to the Work;
  - c. communicates and coordinates with tenant's Employer representatives with respect to the work of the Contractor;
  - d. plans and conducts system shutdowns that may be necessary to accommodate the work of the Contractor; and
  - e. ensures commissioning oversight related to the Contractor' work.
- 4.2.1.5 With respect to execution of projects, various stakeholders will participate. Stakeholders could include government tenants, commercial tenants, non-custodian OGD's (e.g. Justice Canada, Treasury Board Secretariat), authorities having jurisdiction, and the public, among others.
- 4.2.1.6 Integration of associated work means the responsibility of the Contractor to work collaboratively and cooperate with custodians, stakeholders, authorities having jurisdiction and third-party contractors, including Building Control Authorities, to ensure that project execution work is delivered and administered in an efficient and effective manner. This includes among other things, integrating associated work within the design process, and, while acting in the Constructor/Principal Contractor role, accommodating construction work undertaken by others.
- 4.2.2 Scope of Services

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4.2.2.1 The Contractor must integrate all associated work in the execution of the project.

4.2.2.2 The Contractor must;

- a. account for the work of others in project planning, design, construction, commissioning and close-out;
- b. collaborate with OGD custodians, Building Control Authorities, third-party contractors, landlords and stakeholders to facilitate integration, to avoid delivery delays, unauthorized costs and surprises;
- c. provide others with ready access to quality, process and procedural information to enable these third parties to perform their roles as they relate to the project;
- d. establish non-disclosure arrangements and other related measures collaboratively with these third parties, consistent with Access to Information legislation, to protect information that the Contractor deems proprietary; and
- e. schedule and coordinate their work and work by others to achieve the least disruption to occupants and their operations, making every reasonable effort to avoid interference with the performance of work by others.

4.2.2.3 Key activities where the Contractor must integrate with the associated work of others may include:

- a. coordinating design work with the related work of others, and adapting the Contractor's design to accommodate both the related requirements of others and the work of others; this is of particular importance for SSC supplied information technology;
- b. coordinating with Building Control Authorities for any work requiring shut down or interruption of building services or operations; keep duration of these shut downs and interruptions to a minimum; carry out such Work after normal working hours of the occupants;
- c. coordination of work by other including work by Canada's third-party contractors, acting as the Constructor/Principal Contractor and therefore accordingly managing access to the Work site by others;
- d. coordination with PWGSC third-party contractors providing services and products such as with design consultants, information technology suppliers, etc.;
- e. participation in quality assurance and reporting; and
- f. coordination with and response to requirements of federal, provincial and municipal authorities having jurisdiction.

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## **4.3 Quality Management**

### **4.3.1 Context**

- 4.3.1.1 PWGSC is committed to quality management and continual improvement.
- 4.3.1.2 PWGSC performs oversight and quality management on its contracts. Notwithstanding the specific deliverables embedded in this Statement of Work, PWGSC may, from time to time, ask for Contractor information to support its contract quality management.
- 4.3.1.3 The Contractor's quality management system and application of Quality Assurance and Quality Control in carrying out the Work ensures that PWGSC service delivery requirements are performed as required and that quality deficiencies are addressed through a continual improvement process to prevent their recurrence.

### **4.3.2 Scope of Services**

- 4.3.2.1 The Contractor must operate a quality management system which can be applied to the services set out in this Statement of Work. The Contractor must utilize their quality management system to monitor, manage and, where required herein, report on the quality of service delivery, for all services, including subcontracted services.
- 4.3.2.2 The Contractor's quality management system, must be based on sound quality management practices, must define and formalize the Contractor's quality policies and tangible processes that can be applied to the services found within the SOW. It must also address application of continual improvement.
- 4.3.2.3 The Contractor must collaborate with and support the Technical Authority, and other parties, engaged in monitoring of the quality of the Work performed by the Contractor. The Contractor must provide complete and ready access to the Contractor's information that support service delivery under this Contract, including quality documentation and performance management data, and therefore demonstrate that the services and deliverables meet requirements. The Contractor must maintain files in good order, ensure that documents and other information are available and kept in a state of assessment readiness, and ensure that information required to support quality monitoring is available to the TA without delay. The Contractor must provide this information not only through those formal deliverables identified in this Statement of Work but also in response to ad-hoc requests from the Technical Authority.
- 4.3.2.4 Under the quality management system, the Contractor must have and must apply the following quality management elements:
  - a. a quality management plan indicating how the Contractor will meet the requirements set out in this Statement of Work including timelines and resources;
  - b. documented quality control and assurance processes and procedures, supported by:

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- i. performance measurement and reporting deliverables, metrics, baselines and benchmarks to facilitate measurement, reporting, analysis, corrective action and continual improvement of service delivery and related business processes;
  - ii. quality control and assurance checklists; and
  - iii. capabilities to monitor, identify, verify, analyze and report quality deficiencies and to manage their resolution through preventive and corrective action.
- c. documented protocols and schedules for conducting management reviews.

### **4.4 Comply with Procurement and Contracting Requirements**

#### **4.4.1 Context**

4.4.1.1 While the contract for the delivery of project services is between PWGSC and the Contractor, the Contractor will deliver some of the work called for in this Statement of Work through subcontractors.

4.4.1.2 As independent entities, Contractors select and manage their own subcontractor.

#### **4.4.2 Scope of Services**

4.4.2.1 The Contractor must apply procurement and contracting processes to ensure the provision of required materiel and services, and, when subcontracting must:

- a. Employ subcontracting practices that:
  - i. are seen by potential subcontractors to be accessible, open, fair and transparent and reflect good industry practices;
  - ii. provide ongoing opportunities for participation by industry, including by small and medium enterprises (SME's); and
  - iii. result in competitive bidding for subcontracts.
- b. award subcontracts to the lowest cost responsive bidder; should the Contractor wish to deviate from this requirement, advise the TA in writing before doing so by providing a sound justification for the deviation and the circumstances;
- c. document its subcontracting practices and processes; document each individual subcontracting event and justify deviations from these practices and processes, and make related documentation available to the TA upon request;
- d. ensure requirements are fully and clearly defined in tender and contract documents, and minimize requirements for amendments;
- e. make use of National Master Specifications;

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- f. respond diligently to industry or PWGSC inquiries concerning the awarding of subcontracts, and inform the TA of unresolved inquiries in a timely manner;
- g. ensure disputes are resolved effectively and do not negatively affect Canada; and
- h. define the security requirements for contracts and ensure subcontractors meet the appropriate security requirements set out in the Security Requirements Checklist (SRCL).

### **4.5 Construction Health and Safety and Occupational Health and Safety**

#### **4.5.1 Context**

##### **4.5.1.1 Canada is committed to:**

- a. Regulatory compliance and due diligence;
- b. Safe and healthy workplaces for its employees protected under the Canada Labour Code (CLC) Part II and the Canadian Occupational Health and Safety Regulations that are supported by the Treasury Board Policy on Occupational Safety and Health and enhanced by the National Joint Council Occupational Health and Safety Directive;
- c. The protection of every person employed by a Department and every person granted access to the workplaces controlled by that Department; and
- d. Construction health and safety as well as occupational health and safety being an integral component of construction project execution.

4.5.1.2 As the work of third-party contractors and their employees is subject to the laws of the province or territory in which the work is being conducted, the appropriate provincial or territorial authorities have legal jurisdiction over health and safety conditions relative to such work.

4.5.1.3 In some instances more stringent federal requirements will also be applicable to the work of Contractors as Canada must fulfill its duties as an Employer under the Canada Labour Code Part II and federal custodians must support Canada in fulfilling its Employer role.

4.5.1.4 As part of its custodial responsibilities, Canada, through the Building Control Authority, must support Employers in ensuring that the health and safety at work of every person employed by the Employer is protected. This includes but is not limited to federal

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government employees, labour resources under a Contractor's authority, their trade subcontractors, tenants and the public.

### **4.5.1.5 With respect to building occupational health and safety, the Building Control Authority (BCA):**

- a. is responsible for the implementation of the building specific health and safety program comprised of plans including but not limited to: the building-specific health and safety plan, the Building Emergency Evacuation Plan, emergency procedures, the Fire Protection Plan, the Business Continuity Plan, the asbestos management plan, the legionella bacteria control management program and its communication protocol;
- b. consistent with provincial/territorial construction legislation, controls access to building operational locations such as mechanical rooms, electrical panels and building control systems; manages access to the building including defining the time and space which other Contractors may access the building or parts thereof; therefore, determines when and under what circumstances a Contractor may access the building, including common space such as loading docks, elevators and hallways, for purposes of carrying out a project;
- c. attends and provides input to health and safety committees;
- d. is responsible to ensure updates to the building-specific health and safety plan are completed when required or as a result of project execution;
- e. ensures that provisions in Contractor generated Project-specific Health and Safety Plans align with the building-specific health and safety plan and are adequate to cater to the work;
- f. communicates and coordinates with tenant's Employer representatives with respect to the work of the Contractor;
- g. plans and conducts system shutdowns that may be necessary to accommodate the Contractor's work; and
- h. ensures commissioning oversight related to the work.

### **4.5.1.6 For reference, construction health and safety refers to the health and safety of the people undertaking the work, while occupational health and safety is for employees who would be in the workspace where the work is taking place, or adjacent to.**

## **4.5.2 Scope of Services**

### **4.5.2.1 Compliance – General**

#### **4.5.2.1.1 The Contractor must ensure compliance with all construction health and safety and occupational health and safety legislation, codes, standards, policies, and programs.**

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- 4.5.2.1.2 The Contractor must conduct itself in a manner that allows Canada to fulfill its duties as an Employer as given in CLC Part II and its subordinate regulation.
- 4.5.2.1.3 The Contractor must ensure the health and safety of persons granted access to the Work site is protected. This must include but not be limited to the employees of the Contractor and their sub-contractors; work and activities carried out by the Canada including Canada's contractors and subcontractors; Canada's employees; tenants; visitors; and the public.
- 4.5.2.1.4 The Contractor must ensure that all Work managed under this contract are structured and managed such that the role of PWGSC and other government department custodians is not deemed to be the Constructor, Prime Contractor, or Principal Contractor nor, would they be deemed to have control over the Work and/or activity.
- 4.5.2.1.5 With respect to the Work, the Contractor must act as Constructor, Prime Contractor, or Principal Contractor, as the prime accountable authority for health and safety and occupation health and safety in relation to construction as defined in provincial and territorial jurisdictions and their legislation, except where approved in writing by the Technical Authority.
- 4.5.2.1.6 The Contractor must adhere to the circumstances under which the Building Control Authority has granted access to the building, including its definition of the Work site, and access to common space, such as loading docks, elevators and hallways, for purposes of carrying out the Work. The Contractor must account for and conform to the building-specific health and safety plan, associated procedures, practices, etc., and Project-specific Health and Safety plan.
- 4.5.2.1.7 The Contractor must provide support to the Building Control Authority to ensure effective and efficient liaison between the Building Control Authority and the Employer Representatives.
- 4.5.2.2 Compliance –Planning
  - 4.5.2.2.1 The Contractor must plan for construction health and safety as well as occupation health and safety for, but not limited to, aspects including asbestos management, legionella management, hazardous material management and indoor air quality management.
- 4.5.2.3 Compliance – Design
  - 4.5.2.3.1 The Contractor must integrate occupational health and safety requirements outlined during the planning, into the project design in accordance with codes and regulations. The Contractor must also meet minimum requirements for design set in PWGSC Standards including but are not limited to:

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- a. [MD 15000-2012 Mechanical Environmental Standard for Federal Office Building;](#)
- b. [MD 15161-2013 Control of Legionella in Mechanical Systems;](#)
- c. PWGSC Asbestos Management Standard; and
- d. PWGSC Standard on Boilers and Pressure Vessels.

### 4.5.2.4 Compliance –Implementation

- 4.5.2.4.1 The Contractor must ensure to acquire the necessary inspections, approvals, permits, and certificates including those from authorities having jurisdiction, such as, building permits and confined space entry permits, prior to the performance of the Work.
- 4.5.2.4.2 Prior to any on-site Work occurring, the Contractor must assess project hazards and risks, and a Project-specific Health and Safety Plan for the Work must be developed and instituted at the planning stages of a project. The Contractor must:
  - a. meet with the Technical Authority and the Building Control Authority to discuss access to the work site and the arrangement with respect to the Constructor/Principal Contractor role including time and space separation;
  - b. assess the Work site for construction health and safety and occupational health and safety hazards and risks;
  - c. Assess the Work site with respect to the National Fire Code of Canada (NFCC), in particular Section 5.6 Construction and Demolition Sites;
  - d. prepare and submit to the Technical Authority the Project-specific Health and Safety Plan (DID RP3.1-PD-05) ensuring it is compliant with the legislation, and addresses all known and foreseeable hazards and risk; include in the Project-specific Health and Safety Plan a Fire Safety Plan as described in the NFCC;
  - e. coordinating with the Building Control Authority, have written procedures where work requires interruption or could cause activation of fire alarms or fire suppression, extinguishing or protection systems,
  - f. take into consideration access to the work site as defined by the Building Control Authority and the building-specific health and safety plans, associated procedures, practices, etc.;
  - g. include in the Project-specific Health and Safety Plan the list of known hazardous substances, including asbestos, and the identification of areas where hazardous substances are present; hazardous substances may be known by virtue of information provided in the Project Brief, such as the building Asbestos Management Plan, discussions with the Technical Authority and Building Control Authority, or ascertained by the Contractor by visual inspection;
  - h. in the event that the presence or extent of hazardous substances cannot be reasonably ascertained by visual inspection, the existing reports or discussions

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with the TA and BCA, testing must be performed; any need for testing must be identified to PWGSC via the Pre-Design Findings Report (DID RP3-PD-08); the Contractor must obtain the services of a licensed testing contractor and document the results of the testing, along with any recommended actions, in a report; integrate information from this report into the Project-specific Health and Safety Plan;

- i. ensure that their subcontracts identify the known hazardous substances; and
  - j. provide a copy of the Project-specific Health and Safety Plan to the Building Control Authority prior to commencement of Work.
- 4.5.2.4.3 The Contractor must conduct Work site-specific orientation and safety sessions prior to commencement of the Work and thereafter for any new person accessing the Work site. The Contractor must account for and conform to the building-specific health and safety plan, associated procedures, practices, etc., and Project-specific Health and Safety Plan.
- 4.5.2.4.4 For any Work that has the potential for a release of asbestos fibres or could expose federal employees to asbestos fibres, the Contractor must investigate the Work-related exposure risk of asbestos and asbestos-containing materials and prepare a report providing the observations from the investigation and recommendations for controlling exposure risk, all of these being consistent with sections 10.4 and 10.5 of COSHR. The Contractor must provide the report to the Technical Authority via deliverable Items Required Under Section 10.4 of COSHR to Support a Hazard Investigation (DID RP3.1-PD-27).
- 4.5.2.4.5 Further, for any Work that has the potential for a release of asbestos fibres or could expose federal employees to asbestos fibre, the Contractor must provide supporting documentation to the Building Control Authority to assist Canada's employers in meeting the requirement for the development of an Asbestos Exposure Control Plan as per section 10.26.2 (a) to (e) of the Canadian Occupational Health and Safety Regulations (COSHR) and Canada's [Technical guideline to asbestos exposure management programs](#). Specifically the Contractor must provide an Asbestos Control Plan (DID RP3.1-PD-26).
- 4.5.2.4.6 The Contractor must manage all the project safety documents required by the contract and by legislations and policies.
- 4.5.2.4.7 The Contractor must ensure drawings, plans, specifications and safety documents appropriate for the Work are available at the Work site.
- 4.5.2.5 Compliance Monitoring
- 4.5.2.5.1 The Contractor must continuously monitor the Work to ensure adherence to the Project-specific Health and Safety Plan. In addition the Contractor must continuously monitor the Work to ensure compliance with the building-specific health and safety plan, associated procedures, practices, etc., as well as occupational health and safety requirements. Monitoring compliance includes: identification of hazard or non-compliance through inspection; recording observations and conditions; determining

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the need for corrective actions; ensuring those corrective actions are developed and implemented; and being prepared to demonstrate due diligence via appropriate record keeping.

- 4.5.2.5.2 With regards to asbestos, as per articles 10.26.8 of the Canadian Occupational Health and Safety Regulation, where abatement is undertaken the Contractor must plan for and monitor the air in the vicinity of a containment system. The Contractor must prepare containment air sampling instructions in accordance with the most current version of PWGSC Asbestos Management Standard. Samples must be taken at least daily outside the enclosure; if action levels are exceeded ensure corrective measures are taken before abatement work resumes. Asbestos air samples must be reported to the TA via deliverable Asbestos Containment System Air Samples (DID RP3.1-PD-28).
- 4.5.2.5.3 The asbestos air samples results must be posted in a conspicuous place at the Work site.
- 4.5.2.5.4 The asbestos air samples results must be provided to the Building Control Authority who will share the results with the tenant(s). With regards to asbestos, as per articles 10.26.9 of the Canadian Occupational Health and Safety Regulation, at the conclusion of abatement work the Contractor must take and ensure that asbestos clearance air samples meets all the requirements prior to dismantling a containment system. Asbestos clearance air samples must be reported to the TA via deliverable Asbestos Clearance Air Samples (DID RP3.1-PD-29).
- 4.5.2.5.5 The asbestos clearance air samples results must be posted in a conspicuous place at the Work site.
- 4.5.2.5.6 The asbestos clearance air samples results must be provided to the Building Control Authority who will share the results with the tenant(s).
- 4.5.2.6 Compliance - Close out
  - 4.5.2.6.1 With regards to PSGC's MD 15161 – Control of Legionella in Mechanical Systems standard, where the Work includes replacement and/or or repair to Legionella susceptible systems, including cooling towers, open water systems, domestic water systems, humidifiers, and drain pans, the Contractor must prepare and submit to the Technical Authority the Legionella System Risk and Hazard Assessment Form (DID RP3.1-PD-30).

### **4.6 Environmental Protection and Sustainable Development**

#### **4.6.1 Context**

- 4.6.1.1 Canada has legislated to prevent pollution and protect the environment and human health under the Canadian Environmental Protection Act, 1999 (CEPA 1999) and its regulations. A key aspect of CEPA 1999 is the prevention and management of risks posed by toxic and other harmful substances; it also manages environmental and

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human health impacts of products of biotechnology, marine pollution, disposal at sea, vehicle, engine and equipment emissions, fuels, hazardous wastes, environmental emergencies and other sources of pollution.

- 4.6.1.2 PWGSC is committed to an industry wide leadership role in upholding and promoting Canada's policy objectives of environmental protection, sustainable development and climate action (mitigation and adaptation). Our Contractors are expected to reflect this leadership in their performance. The Department's commitments to environmental protection, sustainable development and climate action are reflected in its Real Property Services Business Plan, Sustainable Development Strategies, and its associated policy suite including its Sustainable Buildings Policy, Policy on Environmental Compliance and Sustainability and Asbestos Management Policy.
- 4.6.1.3 As required by the Federal Sustainable Development Act, and through the office of the Commissioner of Environment and Sustainable Development, Canada prepares once every three years the Federal Sustainable Development Strategy (FSDS) inclusive of goals, targets and associated implementation strategies. It provides an integrated, whole of government strategy to achieve environmental sustainability, and links sustainable development planning and reporting with the government's core expenditure planning and reporting system.
- 4.6.1.4 The Government of Canada is committed to becoming a leader in climate action and overall sustainability, and PWGSC is a major enabler of that goal. In response to priorities set out in the FSDS and the Treasury Board Secretariat's Greening Government Strategy, PWGSC released its Carbon Neutral Portfolio Plan, its Real Property Sustainable Development and Environmental Strategy with complimentary implementation plan and commitment framework. The Strategy identifies long-term strategic goals for all three "pillars" of sustainability PWGSC has set to achieve by the year 2050.
- 4.6.1.5 With respect to the Impact Assessment Act, a determination of environmental impacts (or not) is required for all projects on federal lands and can only be made by a federal department, and hence a collaborative process is required between the Contractor and PWGSC. This collaborative process assesses the potential impacts of the proposed project, recommends mitigation measures (where appropriate) that would be integrated into the project design and delivery and then allows the Contractor to proceed with the project in a matter that minimises the environmental impact.
- 4.6.1.6 With respect Green House Gas (GHG) emissions, a project GHG Options Analysis methodology was developed to incorporate greenhouse gas emissions reduction and their financial impact into Real Property Investment Decisions. A GHG Options Analysis is typically part of the Business Case (formerly called Investment Analysis Report (IAR)).
- 4.6.1.7 The application of the GHG Options Analysis ensures that PWGSC complies with the Greening Government Strategy that all new buildings and major building retrofits prioritize low carbon investments based on integrated design principles, and life-cycle and total cost of ownership assessments. More specifically, the GHG Options Analysis establishes a project's GHG emission performance target. Where a project has established this target, the Contractor must account for the target in their design, and

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confirm that the final project design meets, at the very minimum, the established GHG emission performance target set out for the project.

### **4.6.2 Scope of Services**

4.6.2.1 With respect to both design and execution, the Contractor must integrate environmental protection, sustainable development and climate action into the Work including, but not limited to, the following considerations:

- a. halocarbon management;
- b. storage tank system management;
- c. hazardous waste management;
- d. polychlorinated biphenyls (PCB) management;
- e. indoor air quality management;
- f. prevention and reduction of operational waste;
- g. eliminate or reduce the use of plastics, and maximize diversion of plastic waste;
- h. reduction of construction, demolition and deconstruction (CRD) waste;
- i. reduction in potable water consumption;
- j. control of energy;
- k. reduction of GHG emissions (produced and embodied);
- l. climate resilience consideration for future claim change-related variances;
- m. sustainability's three pillars of social, environmental and financial; and
- n. incorporation of sustainable and resilient design, environmentally responsible goods and services, and life cycle assessment and management practices.

4.6.2.2 The Contractor must account for project-specific environmental protection and sustainability requirements such as:

- a. energy usage reductions targets;
- b. GHG emission performance targets; and
- c. specific equipment, materials, systems, techniques and/or standards.

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- 4.6.2.3 The Contractor must comply with mitigation measures and follow-up requirements consequent to the impact assessment of a project.
- 4.6.2.4 The Contractor must arrange for the collection, storage, transfer and final disposal of hazardous waste, in accordance with legislative requirements.
- 4.6.2.5 With respect to environmental emergency management, the Contractor must take immediate action to mitigate the impact of an environmental incident.
- 4.6.2.6 The Contractor must collect, maintain, make available and/or submit to the Authority Having Jurisdiction and PWGSC all records, information and data as required by legislation.
- 4.6.2.7 With respect to sustainability the Contractor must develop and submit a Project Sustainability Strategy.
- 4.6.2.8 Sustainability objectives and innovative strategies must be integrated throughout the evolution of the Project, balancing environmental, social and economic values and impacts for smarter, healthier and more productive workplaces.
- 4.6.2.9 The Contractor must incorporate greenhouse gas (GHG) emissions reduction into the project design.
- 4.6.2.10 Where the project has established a GHG emissions performance target in the Business Case, the Contractor must confirm that the project design meets the target. The Contractor must:
  - a. Quantify the annual energy consumption, energy costs and GHG emissions of the project.
  - b. Ensure that the project's estimated energy consumption, energy costs and GHG emissions meet the project scope and targets established in the Business Case.
  - c. Determine the capital construction and lifecycle cost of the project design.
- 4.6.2.11 When requested in the RFP and identified via the Project Brief, prepare and submit to the Technical Authority deliverable Evaluate Project GHG Emissions (DID RP3.1-PD-24) which is an evaluation of project GHG emission reductions demonstrating that the scope and targets established in the Business Case are met, including greening parameters and total cost of ownership assessments. In accordance with the commitments and performance targets listed in the most current version of the PWGSC Real Property Sustainability Handbook, the Contractor must produce a project specific sustainability strategy Report. This will also be guided by any project specific sustainability requirements where detailed in the Project Brief. The sustainability strategy as described in deliverable Project Sustainability Strategy (DID RP3.1-PD-22).
- 4.6.2.12 The Contractor must obtain sustainability standard certifications for applicable projects, as defined in the Real Property Sustainability Handbook, using industry-recognized certification programs to meet or exceed PWGSC commitments and support the

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adoption of resilient, healthy and sustainable places as described in deliverable Third Party Sustainability Standard Certification for Projects (DID RP3.1-PD-23).

- 4.6.2.13 The Contractor must develop and implement a Non-Hazardous CRD Waste Management Plan to maximize waste prevention and diversion opportunities, diverting at least 75% of CRD materials from landfill through reduction, re-use and recycling, including innovative solutions on packaging and plastics as per deliverable Construction, Renovation and Demolition (CRD) Waste Management Plan (DID RP3.1-PD-25).

## **4.7 Stewardship of Federal Heritage Buildings**

### **4.7.1 Context**

- 4.7.1.1 The National Capital Commission, under the National Capital Act, has legislated responsibilities for real property within the National Capital Region (NCR). These responsibilities include exterior alterations and additions to buildings on federal lands in the NCR. Federally, Parks Canada establishes national goals to protect federal heritage buildings and national historic sites. It also develops policies, standards and guidelines in consultation with other departments. Through the Federal Heritage Buildings Review Office (FHBRO), Parks Canada provides criteria and a process for evaluating and designating heritage character, provides advice and recommendations to other departments. The FHBRO has authority to ensure design is implemented within established heritage conservation guidelines best practices as stated in the pan-Canadian Standards and Guidelines for the Conservation of Historic Places in Canada.
- 4.7.1.2 The TB Policy on Management of Real Property requires that 40 years after construction, federally owned buildings that reached the threshold age established by TB be submitted to the FHBRO for evaluation, to determine their heritage status. The resulting heritage evaluation provides one of two statuses: Designated (as a Federal Heritage Building [FHB]), or Not Designated. In rendering its designation decision, for each building designated, FHBRO produces a Heritage Character Statement (HCS) that provides details on the reasons for the designation and on the Heritage Values (HV) and the Character-Defining Elements (CDE) that must be conserved. In some cases, FHB have elaborated heritage documentation produced by FHBRO to guide interventions; this documentation includes the Heritage Conservation Guideline, and the Heritage Conservation Plan and Heritage Conservation Brief. Collectively this information guides decisions on how projects (interventions) are to be undertaken in that FHB.
- 4.7.1.3 Additionally, the Policy on Management of Real Property requires that any subsequent interventions within a FHB respect and protect its heritage character, this all in accordance with FHBRO recommendations and advice. The HCS is to be used in conjunction with the Parks Canada's Standards and Guidelines for the Conservation of Historic Places in Canada (Standards and Guidelines) and the PWGSC project's Conservation Approach Brief to help designers plan and decide best how to conserve FHB. For FHB, FHBRO reviews the proposed intervention, which is conveyed to them by PWGSC via the HCS and the Conservation Approach Brief, and comments on the

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proposed design for its impact on its HV and CDE. FHBRO heritage conservation recommendations and advice, which are to be accounted for during project design and construction, are returned to PWGSC via the Review of Intervention Report (ROIR). To this end, PWGSC continues to seek FHBRO input at regular intervals throughout the design phase of the project.

- 4.7.1.4 Federally owned buildings approaching or over the threshold age that have not yet been evaluated and are therefore not designated must adhere to a number of due diligence measures to mitigate irreversible damage to, or loss of, potential CDE or heritage value, ranging from undertaking no major construction until the heritage evaluation process has been completed to undertaking construction only under the advice of conservation experts. Should PWGSC elect to undertake work in these buildings, PWGSC Technical Services Heritage Conservation Services (TS-HCS) will examine and provide heritage conservation recommendations and advice with respect to the proposed intervention. Recommendations and advice are furnished relative to the project's Conservation Approach Brief.
- 4.7.1.5 The Real Property Services Procedure on the Stewardship of Federal Heritage Buildings addresses the heritage conservation requirements prescribed in the TB Policy on Management of Real Property through sound management and good practices. The Procedure provides the heritage context and detailed processes for the stewardship of federal heritage buildings and describes the roles and responsibilities of stakeholders.
- 4.7.1.6 Heritage conservation requirements and activities including monitoring and reporting on compliance with the Policy on the Stewardship of Federal Heritage Buildings are coordinated regionally by PWGSC Regional Heritage Coordinators and nationally by the PWGSC National Heritage Coordinator.
- 4.7.2 Scope of Services
  - 4.7.2.1 Where applicable as stated in the RFP and identified in the Project Brief and the Conservation Approach Brief, the Contractor must provide all Services to protect the FHB, including the associated Landscapes and Grounds.
  - 4.7.2.2 The Contractor must provide specialized Heritage Conservation Services required in accordance with, and to fully comply with: the TB Policy on the Management of Real Property, the RPS Policy and the Procedure on the Stewardship of Federal Heritage Buildings, and the Standards and Guidelines for the Conservation of Historic Places in Canada.
  - 4.7.2.3 All conservation-specific requirements, procedures and deliverables are specified in the RPS Procedure on the Stewardship of Federal Heritage Buildings. More specifically, when requested in the RFP and identified via the Project Brief, the Contractor must prepare and submit to the TA an updated Conservation Approach Brief (DID RP3.1-PD-19), which is reflective of the project scope and the nature of the proposed intervention.
  - 4.7.2.4 The Contractor must prepare the Heritage Conformity Form (DID RP3.1-PD-21) to confirm that heritage values have been considered, heritage conservation experts have

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been consulted and their advice considered, and heritage documentation have been completed during all phases of the conservation projects.

- 4.7.2.5 Where applicable as stated in the RFP and identified in the Project Brief and in the Conservation Approach Brief, the Contractor must provide services to protect those Movable Heritage Assets listed in the Project Brief during work on site. The Contractor must provide specialized Conservation Services required in accordance with, and to fully comply with, the provisions of the Treasury Board Guide to Management of Movable Heritage Assets and the Treasury Board Policy on the Management of Materiel. For those Moveable Heritage Assets which may be potentially affected or affected during the Work, including during accessing the Work site, the Contractor must prepare and submit to the Technical Authority deliverable Movable Heritage Protection Measures Plan (DID RP3.1-PD-20) which is reflective of the nature of the proposed intervention.

### 4.8 Risk Management

#### 4.8.1 Context

- 4.8.1.1 PWGSC is committed to incorporating risk information into its decision-making processes. Integrated risk management at PWGSC involves implementing a risk-smart culture in which risk management principles inform business planning, decision making and support operational process.
- 4.8.1.2 Risk Management within PWGSC is guided by the [Treasury Board Policy on Management of Real Property](#) and the Treasury Board [Framework for the Management of Risk](#). The former aims to ensure real property is managed in a sustainable and financially responsible manner, throughout its life cycle, to support the cost-effective and efficient delivery of government programs. Risk management is a key element of sound stewardship and value for money in the management of real property. To fulfil its requirements PWGSC must:
- a. use risk management to assist decision making at every step of real property life cycle management;
  - b. identify risk in the project planning stages, encompassing the total expected lifetime of an asset, the impact of the project and be integrated with an organization-wide risk management process; and
  - c. consider risk at the Portfolio, Asset and Project levels
- 4.8.1.3 The Treasury Board Framework for the Management of Risk is a principles-based approach to risk management that provides the flexibility to departments and agencies to tailor management solutions to their mandate and objectives. To meet the principles of the Framework PWGSC applies its own Policy (Policy on Integrated Risk Management). This policy requires that risk management principles be integrated into business planning, decision-making and operational processes, including project planning. To ensure that the project is in accordance with the policy, the Contractor

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must produce a Risk Management Plan. Please refer back to section 2.1.1.4 for details.

4.8.1.4 A risk is defined as a potential event or situation in the future while an issue is an event or situation that has happened in the past or is happening in the present. In other words, risks are potential future problems and issues are current problems.

### **4.8.2 Scope of Services**

#### **4.8.2.1 The Contractor must:**

- a. identify risks associated with the project;
- b. analyze the identified risks in order to assess their potential threat to project, operations and assets, and determine the degree of exposure in terms of frequency and severity;
- c. respond to the identified risks by eliminating or reducing the risk by considering alternatives to current or proposed activities;
- d. manage the project in accordance to the risk management measures; and
- e. prepare, maintain and implement mitigation measures identified in the Risk Management Plan (DID-RP-3.1-PD-40).
- f. Report and update risks monthly via deliverable Project Status Report (DID RP3.1-PD-02).

## **4.9 Change & Claims Management**

### **4.9.1 Context**

- 4.9.1.1 Projects may undergo necessary additions, deletions or other work-related changes (herein referred to as “change”) consistent with the general intent of a contract through the project lifecycle. Change in the work may lead to cost increases (or decreases) as well as schedule impacts.
- 4.9.1.2 Change may stem from, but are not limited to the following sources: new PWGSC requirements; modified PWGSC requirements; and unforeseen site conditions.
- 4.9.1.3 The management of change requires substantiation that the change is necessary and that the associated impacts (e.g. cost, schedule) are adequately estimated. The impacts of change must be made clear to all stakeholders.
- 4.9.1.4 With respect to the work that PWGSC requires the Contractor to subcontract work to subcontractors, the Contractor will manage changes through contract amendments and construction change notice (CCN)/change order (CO) processes as are typical to the construction industry. When changes in the work are deemed necessary, the

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Contractor is expected to document the complete CCN/CO processes; and where requested, furnish the complete information from these processes to PWGSC to allow review of proposed changes including the associated price and schedule implications.

- 4.9.1.5 Changes may also cause disagreements amongst parties being impacted by the change and where not resolved lead to claims. Therefore contracts should include a process for resolution of conflicts amongst parties.

### **4.9.2 Scope of Services**

- 4.9.2.1 The Contractor must ensure that all reasonable efforts are made to protect Canada from and against all claims, demands, losses, costs, damages, actions, suits, or proceedings by any third party, brought or prosecuted and in any manner based upon, arising out of, related to, occasioned by, or attributable to the activities of the Contractor, its trade subcontractors and suppliers and any other person at any tier, in performing the Work.

- 4.9.2.2 With respect to the management of changes, between itself and PWGSC, the Contractor must:

- a. plan ahead to forecast changes, minimize their impact, and make recommendations on the best approach to resolve scope changes;
- b. manage, track, and control scope as well as report on and minimize changes during construction;
- c. ensure that the change is necessary and that the associated impacts, in particular to contract value, schedule, material milestone completion dates, and the completion date, are adequately estimated and accounted for, and clear to all stakeholders;
- d. control costs of changes made during construction to maintain scope, budget and schedule. This includes negotiating with trade subcontractors to prevent any potential claims arising out of the Work; and
- e. manage change between itself and its trade subcontractors, and use construction change notice (CCN)/change order (CO) processes as are customary to the construction industry to manage the change: where Contractor/trade subcontractor changes are proposed to be passed onto PWGSC as a price increase, formally identify the change through the required change management process and obtain acceptance by the Technical Authority or Contract Authority before proceeding with the associated Work: proposed price changes must be accompanied by an explanation as to their necessity, the impacts to the project, notably scope and schedule impacts, and an opinion as to the reasonableness of the trade subcontractor's proposed price; when requested by the Technical Authority, share information related to the change as exchanged between itself and its trade subcontractors to aid PWGSC understanding the proposed change including pricing.

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- 4.9.2.3 As it relates to the Performance Measurement Regime and more specifically the Achieve On-Time Performance of the Project performance priority, the Contractor must identify any proposed change (i.e. extension/alteration to a “completed-by” date associated with a checkpoint) through the deliverable Amendment to the Checkpoints/Dates for the On-Time Performance Priority (DID RP3.1-PD-44). The explicit or implied acceptance of a proposed change to the “completed-by” date for these specific deliverables by any other means of change will not be recognized by PWGSC for the purpose of the Performance Measurement Regime.
- 4.9.2.4 With respect to managing potential and/or actual claims, either between itself and its trade subcontractors, or against PWGSC, the Contractor must:
- a. manage independently of PWGSC all claims between itself and its trade subcontractors; and
  - b. for all other claims: manage issues for PWGSC arising from the claim; advise the Technical Authority of notification, analysis, mitigation measures taken; and provide recommendations (with justification) on how to proceed with the claim; the Contractor must provide all information in a clear and logical format within an established claims management process.

### **4.10 Accessibility**

#### **4.10.1 Context**

- 4.10.1.1 To ensure a barrier-free Canada, The Accessible Canada Act came into force on July 11, 2019 in order to increase the inclusion and participation of Canadians who have visible or invisible disabilities, or functional limitations by supporting the identification, removal, and prevention of barriers in areas that fall under federal jurisdiction.
- 4.10.1.2 The Accessibility Strategy for the Public Service of Canada provides an integrated, whole of government strategy to achieve the vision of becoming the most accessible and public service in the world. It was developed based on the guiding principle of “Nothing without us”, ensuring persons with disabilities are involved in the design and implementation of the strategy.
- 4.10.1.3 As the lead for Goal #2: Enhancing the Accessibility of the Built Environment under the strategy PWGSC is committed to leadership role in upholding and promoting Canada's objectives related to accessibility with a focus on identifying ways to not only meet current accessibility codes and standards but to exceed these requirements. Our Contractors are expected to reflect this leadership in their performance. The Department's commitments towards accessibility are reflected in its Real Property

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Services Business Plan, PSPC Accessibility Action Plan, and its associated policy suite including the RPS Accessibility Procedures.

- 4.10.1.4 In keeping with the principle of “Nothing without us” PWGSC must strive to incorporate the feedback of persons with disabilities (employees, clients and others who regularly conduct business in the building) for all new designs, builds or retrofits.
- 4.10.1.5 The Treasury Board Accessibility Standard for Real Property (TB-ASRP) establishes the minimum requirements for accessibility of the government of real property and references the CSA Group’s Accessible Design for the Built Environment (CSA B651-18) as the technical reference in order to meet these requirements. The TB-ASRP provides deputy heads, or delegate, with the authority to grant full and/or partial exemptions from the accessibility requirements or to delegate this authority.
- 4.10.1.6 The Real Property Services Accessibility Procedure provides clarification on the application of the Treasury Board Accessibility Standard for Real Property (TB-ASRP) with respect to real property that is or will come under the administration of PWGSC. It ensures that compliance with current accessibility requirements is evaluated, monitored and reported; and exemptions and/or minor variations are appropriately considered, approved and documented.
- 4.10.1.7 With respect to the exemption from accessibility requirement. An exemption can only be granted by the deputy head or their delegate and hence a collaborative process is required between the Contractor and PWGSC.
- 4.10.2 Scope of Services
  - 4.10.2.1 With respect to both design and execution, the Contractor must integrate accessibility requirements and considerations into the Work including identifying opportunities to exceed the minimum requirements of current codes and standards.
  - 4.10.2.2 With respect to design the Contractor must ensure they have incorporated the feedback of persons with disabilities (employees, clients and others who regularly conduct business in the building) in the project.
  - 4.10.2.3 Where an exemption to accessibility requirements is deemed necessary the Contractor must prepare and submit to the TA an Exemption Request Form (DID RP3.1-PD-42) to request approval of a full or partial exemption to the accessibility requirements of the Treasury Board Accessibility Standard for Real Property (TB-ASRP) including the technical standard “Accessible Design for the Built Environment” CSA-B651-18.

### **4.11 Data and Information Management, and Deliverables**

- 4.11.1 Manage Data, Information, Reports and Records

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## **4.11.1.1 Context**

4.11.1.1.1 Information Management refers to the secure creation, capture, storage, retrieval and reporting of data and information. Reporting may include electronic, printed or other formats.

4.11.1.1.2 PWGSC requires that its Contractors create, capture, store, retrieve and report specific data / information. Notwithstanding this, PWGSC's Contractors may likewise create, capture, store, retrieve and report specific data / information for their own purposes and which they deem necessary in order to fulfill the requirements of their contracts.

4.11.1.1.3 This data / information is used for such purposes as: legislated and other reporting requirements; trend analysis; responding to inquiries; decision making; contract management oversight; continuous improvement; and for historical reference.

## **4.11.1.2 Scope of Services**

4.11.1.2.1 The Contractor must manage the security and quality of data / information to ensure its accuracy, completeness and integrity is maintained.

4.11.1.2.2 The Contractor must ensure the application and maintenance of information security protocols; and security classifications of Contractor personnel resources as set out in the Supplementary Conditions.

4.11.1.2.3 The Contractor must collect and organize information, and manage records and supporting data necessary to:

- a. Support service delivery and reporting requirements arising from legislation governing the provision of the services set out in the Statement of Work including to allow PWGSC to demonstrate regulatory compliance and fulfill regulatory reporting requirements;
- b. Maintain and ensure the integrity of data / information and keep in good order;
- c. Keep data / information in a state of readiness and available to the Technical Authority without delay to assist Canada in conducting performance monitoring, oversight and reporting activities;
- d. Store, backup, organize and protect data / information in support of security and disaster recovery requirements. This requirement applies to data / information transferred to PWGSC on an on-going basis as well as the data / information being

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collected and stored by the Contractor to conduct their activities related to the contract;

- e. Adhere to PWGSC security procedures for the protection and storage of data /information regarding the assets under Canada's control;
- f. Keep data / information current and up to date; and
- g. Identify and remedy gaps in data / information.

### 4.11.2 Transfer, Retain and Report Data / Information as Deliverables

#### 4.11.2.1 Context

4.11.2.1.1 Canada has diverse and complex reporting requirements to support its real property stewardship role including the following:

- a. The execution of asset management functions to fulfill its operational and strategic real property roles; this includes project and program delivery;
- b. Reporting to central agencies, Parliament and to real property program stakeholders on matters related to the real property holdings for which it is custodian; and
- c. Monitoring, oversight and reporting - verification that its Contractors have performed services outlined in their contracts and to certify that services have been received prior to payments being made.

4.11.2.1.2 PWGSC requires that its Contractors transfer to it, as well as receive from it, specific data / information, this in the form of specific Deliverables. References to Deliverables are found throughout the Statement of Work. Deliverables may form critical input to an internal PWGSC/government process or assist in fulfilling internal regulatory, legislative, policy or reporting obligations. Deliverables may also be required in order to validate Contractor compliance and/or performance with the contract.

4.11.2.1.3 Each Deliverable is uniquely named and numbered, has a Deliverable Item Description, (DID) and other characteristics including what submission purpose it serves, such as for acceptance by PWGSC, when and/or with what frequency it is to be submitted, and how long PWGSC is expected to take to review and respond to the Contractor. A Deliverable Item Description (DID) is a templated form which details the purpose of a Deliverable, indicates references, and provides instructions on how to prepare the Deliverable, which could further include contents to be provided as well as specific formats, forms, etc. to be used. DID's are grouped together in a Deliverable Item Description (DID) Standard.

4.11.2.1.4 The deliverable purposes are:

- a. For Acceptance: Deliverables that require evaluation and a decision from the TA/PWGSC as to the suitability of the deliverable before the Contractor can proceed with certain work and/or before expenditures can be authorized or paid

## Annex A – Statement of Work

(this work and/or expenditures that cannot proceed is indicated in the Deliverable Item Description). For Acceptance Deliverables are either “accepted” or “rejected”. Deliverables which are rejected are to be corrected and resubmitted to the TA.

- b. For Review: Deliverables that form critical input to a government process or assist in fulfilling government regulatory, legislative, policy and/or reporting obligations. The deliverables require evaluation and a decision from the TA/PWGSC as to the suitability of the Deliverable, but do not require a decision before the Contractor can proceed with certain work and/or before expenditures can be authorized or paid. For Review Deliverables are either “reviewed” or “rejected”. Deliverables which are rejected are to be corrected and resubmitted to the TA.
- c. For Information: Deliverables provided for government record-keeping, reference or analysis purposes. Generally, For Information Deliverables will not be reviewed by the TA, but should the deliverable be reviewed it may result in the TA requesting a change and/or resubmission of the deliverable after revision. This request will be communicated via e-mail.

4.11.2.1.5 Deliverables must: provide useful, complete, and valid information and not require further analysis by the recipient in order to execute Work or make decisions; allow the recipient(s) to extract required information directly; be coherent, logical and consistent; and be semantically correct.

4.11.2.1.6 Evaluation of the information contained in any of the three Deliverable types may result in the TA’s request for the Deliverable to be revised and resubmitted. For the For Acceptance and For Review Deliverables, the need to revise and resubmit will be communicated via the Deliverable’s rejection.

4.11.2.1.7 Not all Deliverables may be required to be collected and transferred to Canada for all projects. Deliverable requirements for each project will be outlined in each project’s respective Request for Proposal and its Project Brief.

4.11.2.1.8 From time to time Canada may require a new Deliverable to be furnished that was not included in the Statement of Work/DID Standard. These could take the form of unique reports, extracts, lists, justifications or other types of information, and be something produced by the Contractor in the course of providing the services, or could be something new requested by the TA. Further, these could be due to a new, ongoing data/information requirement, or a temporary requirement driven by the project needs, such as specific reporting requirements owing to the project being in an OGD asset. These are known as Ad Hoc Deliverables and will be identified in each project’s respective Request for Proposal and its Project Brief. Ad Hoc Deliverables are not submitted through the Real Property Portal but instead via e-mail to the TA. For ongoing data/information requirements the intent would be to eventually normalize these into the Statement of Work through its amendment.

4.11.2.1.9 The transfer to and receipt from Canada of Deliverables can occur through various means including encrypted USB keys supplied by PWGSC; the use of an industry standard secure web interface; a certified collaboration tool, such as OPRIMA. The secure web interface, called the Real Property Portal, links to a PWGSC internal system called Real Property Document Exchange (RPDE). PWGSC uses this internal

## **Annex A – Statement of Work**

system to manage its review and exchange, including feedback, of deliverables. Through the Real Property Portal the TA will provide feedback and status-related information on the receipt, review and acceptance of the deliverables. Access is established at the beginning of a contract, and a Real Property Portal User Guide will be made available at the time the access account is created. The Project Brief will identify how each DID is to be submitted during the life of the contract.

4.11.2.1.10 The Real Property Portal is password protected and allows Contractors direct access through a secure firewall with the Government of Canada applications that manage contract Deliverables. The Portal allows authorized users to perform tasks related to Deliverable management; and to view the current status of submitted Deliverables.

4.11.2.1.11 The Real Property Portal permits the transmission of deliverables up to and including Protected A level. Should deliverables be deemed Protected B, Protected C, Confidential, Secret, or Top Secret, these will be transferred by other means to be named in the Project Brief. This will typically be encrypted USB keys, a secure collaboration tool, and/or through a secure web interface.

4.11.2.1.12 IM-IT technologies will evolve over the term of the contract. As a result, the means of exchanging information between Canada and its Contractors will be adapted to take advantage of such advances and remain in step with industry standards and best practices.

### **4.11.2.2 Scope of Services**

4.11.2.2.1 Deliverables are indicated throughout the Statement of Work, with details of each deliverable described in individual Deliverable Item Descriptions (DID). These DID's are found in the Deliverable Item Description Standard.

4.11.2.2.2 The Contractor must prepare and submit data / information deliverables electronically; adhering to appropriate security protocols.

4.11.2.2.3 The Contractor must:

- a. Submit deliverables, including ad hoc deliverables, and track acceptance and/or review of deliverables in accordance with the Deliverable Item Description (DID);
- b. Revise and resubmit rejected deliverables;

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- c. Where PWGSC's return of a For Acceptance or For Review deliverable exceeds the return period stated in the Deliverable Item Description, advise Canada;
- d. Ensure deliverable's formats are consistent and in accordance with the individual Deliverable Item Descriptions;
- e. Ensure the accuracy and completeness of information collected, stored and transferred to Canada; and
- f. For Contracts consisting of multiple projects, the Contractor must uniquely submit the series of deliverables named within this Statement of Work for each individual project, unless otherwise stated in the RFP.

4.11.2.2.4 Unless stated otherwise in the Project Brief the Contractor must submit the deliverable documents through the Real Property Portal.

4.11.2.2.5 For the electronic submissions of deliverables through the Real Property Portal the Contractor must use an up to date web browser from the following list. Additional web browsers will be added as they are certified for use within PWGSC:

- Google Chrome
- Internet Explorer
- Microsoft Edge
- Safari
- Firefox

4.11.2.2.6 From time to time certain deliverables may not be submitted through the Real Property Portal due to the required security treatment of information contained in these deliverables (.e.g. Protected B) which means that the deliverable documents themselves cannot be attached and submitted through the Real Property Portal. Therefore, the Contractor must instead submit, receive and otherwise exchange deliverable documents via the means outlined in the Project Brief. Notwithstanding the means of submitting these deliverable documents, the Contractor must still track the status of the deliverable through the Real Property Portal.

4.11.2.2.7 Where the requirements of a project alter the security levels for the deliverables described in the statement of work (e.g. from Protected A to Protected B), the deliverables documents cannot be submitted through the Real Property Portal nor can the deliverables' status be tracked through the Real Property Portal. In these rare cases, the Contractor must submit the deliverable documents and track deliverable submissions as directed in the Project Brief.

4.11.2.2.8 Where the method of submission is identified as an encrypted USB key, the Contractor must only use encrypted universal serial bus (USB) storage devices that are PWGSC approved and issued; and may be used to temporarily store Government of Canada (GC) information. All devices that are connected into the PWGSC

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Information Technology (IT) infrastructure will be scanned to ensure that there is no executable software, mobile code, or malicious software and to make sure the device is PWGSC approved. If required, secure USBs will be made available at the beginning of the Contract.

4.11.2.2.9 The Contractor must maintain records in an electronic system and provide Canada with the ability to access Contractor-hosted information in compatible formats following Canada document software standards.

4.11.2.2.10 With respect to PDF drawing deliverables, the Contractor must be able to receive and review PWGSC mark-up comments facilitated via PDF mark-up and collaboration software, such as Bluebeam and BIM 360, and in turn respond back to PWGSC in the same manner. PWGSC may or may not choose to provide its feedback PDF mark-up and collaboration software.

## **4.12 Contractor Incentive Program**

### **4.12.1 Context**

4.12.1.1 At any point during the Contract, including upon start-up, a Contractor Incentive Program discretionary reward may be made available to the Contractor to incent and recognize significant contribution by the Contractor to the achievement of outstanding results in the pursuit of Government of Canada targets and priorities or the discharge by PWGSC of its Departmental mandate. The targets which the Contractor must achieve under the Contractor Incentive Program in order to obtain the reward, and the amount of the reward are established by PWGSC, at PWGSC's sole discretion, and authorized by both the Technical and Contracting Authorities. The terms of the Contractor Incentive Program will be established through a letter of emphasis issued by PWGSC.

## **4.13 Performance Measurement**

### **4.13.1 Context**

4.13.1.1 PWGSC is committed to performance management. To this end, Contracts issued against this Supply Arrangement are performance-based and uses Key Performance Indicators (KPI's) to establish specific performance measurement objectives and more specifically to evaluate the Contractor's performance. The KPI's are Effective Risk Mitigation, Achieve On-time Performance of the Project, and Deliverable Quality. Further, the resulting Contract includes provision for a KPI to incentivize the realization of Indigenous Opportunities within the project at the discretion of Canada. At the discretion of Canada means that this KPI will be applied to the specific projects/Contracts Canada chooses to apply it to.

4.13.1.2 The objective of the performance management is to promote continual improvement, client focus and to facilitate the identification and exchange of information on performance issues based on the Contractor's performance measurement processes

## **Annex A – Statement of Work**

and information. Also, as part of Canada's contractor oversight due diligence, performance management aims at ensuring that contract requirements are being met. Canada's quality monitoring activities, specifically performance measurement, will provide an indication of the Contractor's success in achieving Canada specific performance objectives related to projects delivered under this supply arrangement.

- 4.13.1.3 In order to achieve the KPI's, a Performance Management Manual has been established (see Appendix 2 to the SOW - Performance Measurement Manual). Within the Manual is the Performance Management Framework which depicts the performance management structure and therein explains the allocation of incentives to the KPI's. This manual may be amended from time to time or supplemented by other documents supporting Contract Performance Management such as to more specifically detail how KPI's are to be measured and calculated.
- 4.13.1.4 The KPI's provide the means to quantitatively monitor and measure as objectively as possible the Contractor's performance and focus on desired outcomes of the supply arrangement. The Contractor through its performance management regime and its quality management system, and PWGSC through its quality monitoring activities provide performance information and results to measure and improve the effectiveness of service delivery.
- 4.13.1.5 While performance measurement is about tracking the Contractor's progress against the Contract's KPI's, performance management is about managing and achieving these desired performance outcomes, specifically the KPI's. The onus is on the Contractor to perform and obtain effective performance results. This includes establishing and implementing a performance management regime, and self-monitoring and self-correcting its activities and, where necessary, its processes in order to improve its performance if it is not meeting expectations, with the overall objective to ensure that the services are performed as required.
- 4.13.1.6 PWGSC performs oversight on the Contractor's performance management and measures the performance results. Notwithstanding that PWGSC is expected to have on hand the necessary information to perform performance oversight and measurement, when requested to do so the Contractor is expected to provide to the Technical Authority performance-related information. Further, PWGSC may, from time to time, ask for Contractor information to support its general Contract performance oversight.
- 4.13.1.7 While the KPI's and the application of the Performance Measurement Framework is pre-established at the Request for Supply Arrangement stage and will remain as such for purposes of each project-specific RFP, both the maximum available performance incentive and the distribution of the incentive to the KPI's are project-specific and will be established and stated in the RFP. The entire performance incentive is therefore divided among the three or four KPI's, depending on whether Indigenous Opportunities is applicable to the specific project. For Contracts consisting of multiple projects,

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Canada may establish incentives and associated incentive distributions for each individual project. This will be detailed in the RFP.

- 4.13.1.8 Canada reserves the right to add, modify and/or remove KPI's during the term of the supply arrangement upon reasonable prior notice. Canada may also establish additional KPI's and associated requirements.

### **4.13.2 Scope of Services**

- 4.13.2.1 The Contractor must manage its performance against the KPI's identified in the Performance Management Framework and prepare and implement its internal performance measurement regime and quality management processes, at its own cost, in order to contribute to the KPI's of the contract.
- 4.13.2.2 The Contractor must effectively integrate performance management into its Work and effectively apply performance management into the services set out in this Statement of Work.
- 4.13.2.3 The Contractor must collaborate with and support the Technical Authority, and other parties, engaged in the monitoring of the performance of the Work performed by the Contractor.
- 4.13.2.4 The Contractor must provide complete and ready access to the Contractor's information that supports service delivery under this Contract, including performance management information, and therefore demonstrate that the services and deliverables meet performance requirements. The Contractor must provide this information not only through those formal deliverables identified in this Statement of Work but also in response to ad-hoc requests from the Technical Authority. The Contractor must ensure that their performance management regime is capable of producing, collecting and furnishing reliable performance information. The Contractor must maintain information in good order, ensure that information is available and kept in a state of assessment readiness, and ensure that information required to support performance monitoring is available to the TA without delay.
- 4.13.2.5 With respect to the Achieve On-time Performance of the Project KPI, the Contractor must:
  - a. Meet with the TA at the beginning of the project to discuss and agree to the checkpoints to be measured and their associated checkpoint "completed-by" dates;
  - b. Record the results of the above agreement in the deliverable Checkpoints/Dates for the On-Time KPI (DID RP3.1-PD-43) and submit it to the TA;
  - c. Should the Contractor wish to propose for the TA's consideration and approval an extension/alteration to a "completed-by" date associated with one or more checkpoints, record this request on the deliverable Amendment to the Checkpoints/Dates for the On-Time KPI (DID RP3.1-PD-44) and submit it to the TA.
- 4.13.2.6 The Contractor must meet with the TA on a quarterly basis to review performance progress and the interim results. This review shall be done in conjunction with the

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appropriate monthly progress meeting. This review must consist of review of performance issues and problems, and actions being taken or planned to be taken to resolve these. This will also be an opportunity for both parties to identify continual improvement opportunities for the individual KPI's.

- 4.13.2.7 While Contractor performance is monitored by Canada throughout the year and discussed with the Contractor on a quarterly basis, the evaluation of the Contractor's annual performance is completed every twelve months from the date of issuance of the Contract (i.e. sometime within the thirteen month) or at the end of the contract if the contract duration is less than twelve months. Like the quarterly review, the Contractor must meet with the TA annually to review the results for the prior year and identify opportunities for continual improvement. The evaluation of the Contractor's final performance is completed within sixty days of project substantial completion.
- 4.13.2.8 The Contractor must work collaboratively with the TA to resolve disagreement regarding the accuracy of the performance measurement information including the final results.
- 4.13.2.9 The Contractor must reference the PWGSC Performance Management Manual in fulfilling the performance management obligations under this supply arrangement.

### **4.14 Social Procurement**

#### **4.14.1 Context**

- 4.14.1.1 Social procurement has been identified as a Government of Canada priority and is referenced in the PSPC Minister's Mandate Letter. The Government is committed to achieving sustainable social outcomes and benefits through harnessing its buying power. Social procurement can be defined in various ways; however generally speaking, it is a growing international practice that refers to using procurement as a means for achieving strategic social, economic, and workforce development objectives. Purchasers leverage their buying power to generate social value above and beyond the value of the overall purchase requirement.
- 4.14.1.2 The Government continues to build a social procurement framework to increase social value in a fair, inclusive, sustainable and meaningful way to benefit all Canadians. For example, the Government has worked successfully in the past to leverage training opportunities, employment and capacity building for Indigenous Peoples and is pleased to continue working collaboratively with Indigenous communities and stakeholders via its procurement initiatives. The meaningful engagement with Indigenous peoples across Canada is a priority of the Government.
- 4.14.1.3 The Government is continuously seeking and identifying opportunities to collaborate with its partner and stakeholder groups in building capacity to increase overall social benefits to Canadians. As the approach, framework and capacity in social procurement

## **Annex A – Statement of Work**

grows, the Government will consider further opportunities to embed social procurement into their procurement framework.

- 4.14.1.4 Social procurement can be grouped into two approaches; direct and indirect. Direct opportunities means realizing social benefits through the purchasing of goods, services or construction by the Government from: a certified social enterprise; a diverse supplier; an Indigenous owned business; or employment of under-represented groups (LGBTQ+, women, Indigenous Peoples, persons with disabilities and visible minorities). PWGSC defines a diverse supplier as “a business owned or led by Canadians from under-represented groups, such as women, Indigenous Peoples, persons with disabilities and visible minorities.” Each “business” is usually defined as being owned, operated and controlled by 51% of a given group.
- 4.14.1.5 On the other hand, indirect opportunities means realizing social benefits from workforce development. Workforce development benefits are focused on skills training for workers from under-represented groups, who face challenges in entering the work force. Suppliers to the Government of Canada provide benefits and pathways to the work force when they provide or facilitate training and/or education to increase the employability of persons from under-represented groups.
- 4.14.1.6 With the above in mind, this Supply Arrangement encourages all offerors to consider incorporating all aspects of social procurement into their offers and to apply their approach to the individual RFP’s and resulting contracts awarded under this supply arrangement. Further and more specifically, supply arrangement holders awarded contracts will be required to develop and implement Project Specific Indigenous Participation Plans. Finally, PWGSC reserves the right to introduce additional social procurement elements into the Scope of Services for specific RFP’s including requirements for additional mandatory social procurement plans and associated reporting.
- 4.14.1.7 More information on social procurement for this supply arrangement can be found in Annex B Social and Indigenous Procurement.
- 4.14.2 Scope of Services for Indigenous Benefits:
  - 4.14.2.1 The Contractor must prepare and submit a tailored Project Specific Indigenous Participation Plan (DID RP-3.1-PD-31).
  - 4.14.2.2 The Contractor must implement its Project Specific Indigenous Participation Plan.
  - 4.14.2.3 The Contractor must provide a detailed Quarterly Progress Report summarizing the Indigenous opportunities achieved for the previous quarter. The report must include individual and a cumulative accomplishments, the dollar value of the benefits achieved, and an assessment of the quality of the benefit(s). This will be reported through the deliverable Indigenous Participation Plan Reporting (DID RP3.1-PD-320).
  - 4.14.2.4 The Contractor must provide a detailed Final Project Report on the Indigenous opportunities achieved through the project. The report must include details of the individual and cumulative accomplishments, the dollar value of the benefits achieved, and an assessment of the quality of the benefit(s). This will be reported through the

## **Annex A – Statement of Work**

deliverable Indigenous Participation Plan Reporting (DID RP3.1-PD-32) and provided to the Technical Authority within 30 days of Contract completion.

- 4.14.2.5 In order to propose an amendment to the Contractor's Project Specific Indigenous Participation Plan, the Contractor must prepare a Contract Specific Indigenous Participation Plan Amendment (DID RP3.1-PD-31) for the TA's review. In their amendment, the Contractor must indicate what is proposed to be changed in the Plan, provide a justification for the change(s), as well as provide the anticipated impacts to the Plan's results owing to the change(s). Amendments may be proposed at any time during the Contract. Canada is under no obligation to agree to the proposed Contract Specific Indigenous Participation Plan Amendment regardless of its content or its justification.

## Appendix 1 – Deliverable Item Descriptions (DIDs)

## **Annex A Appendix 1**

### **Project Services for Office Fit-ups and Light Base Building Work Deliverable Item Descriptions Standard**

Public Works and Government  
Services Canada  
(PWGSC)

## Record of Change

Date	Changed By	Comment

1. [RP-3 Deliverable Item Descriptions Overview](#)

2. **RP-3 Deliverable Item Descriptions**

[DID RP3.1-PD-01: Project Management Plan \(PMP\)](#)

[DID RP3.1-PD-02: Project Status Report](#)

[DID RP3.1-PD-03: Project Meeting Minutes](#)

[DID RP3.1-PD-04: Construction Cost Estimates](#)

[DID RP3.1-PD-05: Project-specific Health & Safety Plan](#)

[DID RP3.1-PD-06: Reports, letters, orders, etc. as a result of contact, including site visits, by authorities having jurisdiction](#)

DID RP3.1-PD-07: Not in use at this time

[DID RP3.1-PD-08: Pre-Design Findings Report](#)

[DID RP3.1-PD-09: Design Development Packages](#)

[DID RP3.1-PD-10: Preliminary Furniture Recommendations Report](#)

[DID RP3.1-PD-11: Furniture Proposal Package](#)

[DID RP3.1-PD-12: Furniture Deficiency Report](#)

[DID RP3.1-PD-13: CAD As-Built Drawings](#)

[DID RP3.1-PD-14: CAD Occupancy Floor Plans](#)

DID RP3.1-PD-15: Not in use at this time

DID RP3.1-PD-16: Not in use at this time

DID RP3.1-PD-17: Not in use at this time

DID RP3.1-PD-18: Not in use at this time

[DID RP3.1-PD-19: Conservation Approach Brief \(CAB\)](#)

[DID RP3.1-PD-20: Movable Heritage Protection Measures Plan](#)

[DID RP3.1-PD-21: Heritage Conformity Form](#)

[DID RP3.1-PD-22: Project Sustainability Strategy \(includes Project Sustainability Planning and Tracking Tool\)](#)

[DID RP3.1-PD-23: Third Party Sustainability Standard Certification for Projects](#)

[DID RP3.1-PD-24: Evaluate Project GHG Emissions](#)

[DID RP3.1-PD-25: Construction, Renovation and Demolition \(CRD\) Waste Management Plan](#)

[DID RP3.1-PD-26: Asbestos Control Plan](#)

[DID RP3.1-PD-27: Items required under section 10.4 of COSHR to support the BCA](#)

[DID RP3.1-PD-28: Asbestos Containment System Air Samples](#)

[DID RP3.1-PD-29: Asbestos Clearance Air Samples](#)

[DID RP3.1-PD-30: Legionella System Risk and Hazard Assessment Form](#)

[DID RP3.1-PD-31: Project Specific Indigenous Participation Plan and Amendments](#)

[DID RP3.1-PD-32: Indigenous Participation Plan Reporting](#)

DID RP3.1-PD-33: Not in use at this time

[DID RP3.1-PD-34: Commissioning Packages](#)

DID RP3.1-PD-35: Not in use at this time

DID RP3.1-PD-36: Not in use at this time

DID RP3.1-PD-37: Not in use at this time

DID RP3.1-PD-38: Not in use at this time

DID RP3.1-PD-39: Not in use at this time

[DID RP3.1-PD-40: Risk management Plan](#)

[DID RP3.1-PD-41: Lessons Learned Log](#)

[DID RP3.1-PD-42: Exemption to Accessibility Requirements](#)

[DID RP3.1-PD-43: Checkpoints/Dates for the On-Time KPI](#)

[DID RP3.1-PD-44: Amendment to the Checkpoints/Dates for the On-Time Key Performance Indicator \(KPI\)](#)

## **1. RP-3.1 Deliverable Item Descriptions Overview**

1.1 RP-3.1 Deliverable Item Descriptions (DIDs) set out the purpose and required content of the deliverables associated with the RP-3.1 Statement of Work (SOW), including format and preparation instructions. DIDs are cross-referenced to the RP-3.1 SOW.

1.2 Each DID has a “SOW Reference” field which indicates the main section of the SOW that is relevant to the deliverable. Some DIDs mandate the format in the “Preparation Instructions” field. The “Related Documents” field refers to other guidance documents and policies that provide supporting information that can assist in preparing the deliverable.

1.3 Additional direction on DIDs and their submission can be found in the SOW under Section Data and Information Management, and Deliverables.

1.4 As the party submitting the deliverable may not be the author of the document, the Contractor must keep a record of who authored it.

## 2. RP-3.1 Deliverable Item Descriptions

<b>DID RP3.1-PD-01: Project Management Plan (PMP)</b>
<b><u>SOW Reference:</u></b> Scope of Services for Project Management
<b><u>Purpose:</u></b> The <i>Project Management Plan (PMP)</i> describes how the project will be managed according to industry's best practices. The purpose of this deliverable is to provide PSPC with confidence that the project will be managed in a manner that will facilitate meeting project objectives.
<b><u>Related Documents:</u></b> <ul style="list-style-type: none"><li>• Project Management Institute's (PMI) Project Management Body of Knowledge (PMBOK)</li><li>• PSPC Guide to the Project Management Plan</li><li>• <i>Construction Cost Estimates</i> (DID RP3.1-PD-04)</li></ul>
<b><u>Preparation Instructions:</u></b> <p>Use the PSPC Project Navigator SMART Document Template – Project Management Plan. Where the template references to “provide GCdocs link”, provide the required document separately as an appendix to the PMP. The TA may provide some data to enable the Contractor to populate certain sections of the template (ex. project risk and complexity score, benefit realization objectives or plans). References to “Project Cost Workbooks” should be disregarded and instead refer to DID RP3.1-PD-04 <i>Construction Cost Estimates</i>.</p>
<b><u>Submission Purpose:</u></b> For Review.
<b><u>Frequency/Timing:</u></b> Once, within 30 days after contract award; resubmit when any major changes in scope, schedule or costs arise; also, resubmit at the transition point between the design and construction phases; and at the end of the project for record purposes.
<b><u>Internal Review Period:</u></b> 18 calendar days.

<b>DID RP3.1-PD-02: Project Status Report</b>
<b><u>SOW Reference:</u></b> Scope of Services for Project Management
<b><u>Purpose:</u></b> The <i>Project Status Report</i> provides information on the progress and the performance of the project. The purpose of this deliverable is to provide PSPC the information required to monitor the status of the delivery of the project including costs, schedules, scope changes, risks, issues and mitigations. It is the central document in preparation for the monthly project meetings. The data provided feeds into the various

PSPC reporting tools and is used to seek or report against project and expenditure approvals. Additionally, the data provided supports the reviews for verification of the monthly invoices.

**Related Documents:**

- DID RP3.1-PD-01 – Project Management Plan (PMP)
- DID RP3.1-PD-03 – Project Meeting Minutes
- DID RP3.1-PD-04 – Cost Estimates

**Preparation Instruction:**

The Project Status Report shall be prepared in the Monthly Project Status Report template, in accordance the instructions provided in the template.

**Submission Purpose:** For Information.

**Frequency/Timing:** Every month by the 28<sup>th</sup> day.

**Internal Review Period:** Not Applicable

DID RP3.1-PD-02: Project Status Report Template

## MONTHLY PROJECT STATUS REPORT

### PROJECT DETAILS

<b>To PSPC:</b>	Name:	Position:	Date of submission:	
<b>From:</b>	Name:	Position:	Report Period:	
<b>Contract #:</b>		<b>Project #:</b>	Building:	
<b>Project Name:</b>				Address:

### PROJECT PULSE

Status	Overall Status	Scope	Budget	Schedule
Last Period				
This Period				

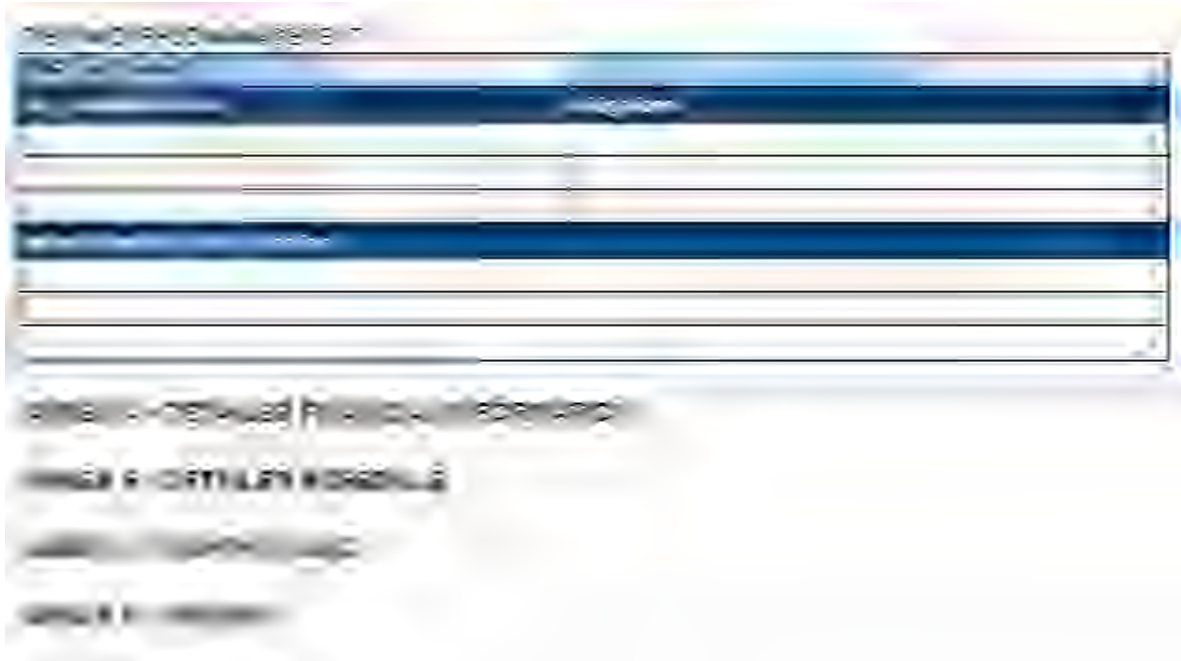
OK ●    Cautious ●    Issue ●

### FINANCIAL SUMMARY

Approved Budget (All years)	Estimate at Completion	Forecasted value of work for Current FY	Year to date Invoiced	Total Invoiced (All years)
<b>P1 Forecast</b>		<b>P1 Forecast</b>		<b>P10 Forecast</b>

### SCHEDULE UPDATE

WBS ID	Project Milestones	Planned Date	Date Per Latest Schedule	Actual Date
1				
2				
3				
4				
5				
Key Activities				Achieved Yes/No
1	66% Design Development Package submitted and verified as "Reviewed" by the TA (the "completed by" will need to account for the eighteen calendar days for PWGSC to complete their review)			
2	99% Final Design Package submitted and verified as "Reviewed" by the TA (the "completed by" will need to account for the eighteen calendar days for PWGSC to complete their review)			
3	construction tenders issued by the Contractor			
4	certificate of substantial completion			
5	application for permits/permits received			
	The schedule must also include all "checkpoints" associated with the Achieve On-time Performance of the Project performance priority			
Key Project Activity Status / Look Ahead				
Critical Path Analysis				



DID RP3.1-PD-02: Project Status Report Template Instructions

# MONTHLY PROJECT STATUS REPORT PREPARATION INSTRUCTIONS

PROJECT IDENTIFICATION	
To PSFG:	Enter the name and position of PSFG person for which this report is prepared
From:	Enter the name and position of contractor representative that prepared the report
Contract Number:	Enter Contract Number
Project #:	Enter PSFG Project Number
Project Name:	Enter Project Name as provided by PSFG
Date:	Input the date that the report was prepared
Report Period:	Choose the month for which the report was prepared for
Building and Address:	Input the full building name and address

## PROJECT PULSE

The section will be manually filled out by the contractor based on thresholds of the project using the criteria below. For any projects flagged as Yellow or Red either supporting information into Risk and Issues Management Section.

	GREEN	YELLOW	RED
<b>Overall Status:</b> Overall status of the project based on Scope, Budget and Schedule.	<b>Optimal Performance (now and overall)</b> The project requirements (project and known and requirements or targets) have not changed in the project.	<b>Not currently in line with the baseline, but within approved parameters.</b> The project requirements are not clear. The requirements changes may impact the project negatively.	<b>At risk of requiring new approvals. Not within approved parameters.</b> The project requirements are not known. The requirements changes will impact negatively the project.
<b>Scope:</b> Reflects the projects Scope.	The project current expenditures are not in line with the plan, but the forecasted expenditures (including the new allowances) do not exceed the Expenditure Authority of the Project Authority.	The project current expenditures are not currently in line with the approved schedule, but the overall project completion date will be respected.	The project current expenditures forecasted are Expenditure Authority of the Project Authority.
<b>Budget:</b> Reflects the status of the project's budget. Cannot be given if the project shows cost overruns.	The project milestones are currently in line with the approved schedule. The overall project completion date will also be respected.	The project milestones are not currently in line with the approved schedule, but the overall project completion date will be respected.	The project milestones are not currently in line with the approved schedule, not will the overall schedule time of the project.
<b>Schedule:</b> Reflects the status of the project's schedule. Cannot be given if the project shows schedule overruns.			

FINANCIAL SUMMARY	
Approved Budget (all Years):	Approved value of the contract for all fiscal years including all change orders.
Estimate at Completion:	Estimated cost of the project at completion (all years).
Forecasted value of work for Current FY:	Forecasted value of work for current fiscal year (June - March)
Year to Date Invoiced:	Invoiced amount to year to date
Total Invoiced All Years:	Invoiced amount all years
PS, PM, PMC Forecast:	Input the forecasted cost at the appropriate time of the user.

SCHEDULE	
Project Milestones	Contractor to include final key milestones which should include but not be limited to:
Planned Dates (Baseline)	Date for the baseline established in the Project Management Plan or re-baselined as per the change management process.
Dates Per Latest Schedule	Dates as per the latest schedule.
Actual Date	Date the activity was actually completed.
Key Project Activity Status / Look Ahead	Provide an overview of major project activities that were underway or completed during the previous month and accounting up to the following month.
Critical Path Analysis	List any items on the critical path (from the approved Baseline) that were impacted through the month. A reason for the impact must be provided, as well as a plan to recover the time impact with the delay. If the Contractor believes that there was a Government caused delay, they must show the critical path impact, and the cause and duration of this delay.

RISK AND ISSUES MANAGEMENT	
RMP Last Updated	Enter date
Top 3 Identified Risk	From the risk management plan, list the top 3 lower risk, qualitative given the current status of the project including any items flagged in Project M.P.P.
Mitigations	Advise PSPC of how contractor is mitigating these risks
Issues Requiring PSPC Attention	Advise of issues requiring PSPC attention (e.g. coordination issues with SSC, client requesting scope changes, working with other contractors, etc.)

ANNEX A - DETAILED FINANCIAL INFORMATION
This information should align with the format of the Cost Estimates. See the Cost Estimate Template. RPP2.xlsx as found in D:\D-RP3-1-P2-04-Construction Cost Estimates.

ANNEX B - DETAILED SCHEDULE
Provide Gantt chart schedule which identifies all minimum key milestones including any phases - planned date as per baseline established in the RMP or re-baselined as per the change management process. This is a planned schedule. Actual date services against baseline schedule again, the date presented in last month's report.
Critical path

#### ANNEX C - MONTHLY LOG

Include a log including, but not limited to the following for each month:

- Significant scope changes
- High level activities performed/completed
- Significant events (e.g. H&C, safety audits, shut-downs due to COVID-19)
- Realized or anticipated risks that had been previously been identified
- New risks identified and mitigation strategy
- History of issues that arose and how they were mitigated
- Evaluation of any delays against expectations
- Key statistics taken
- Changes in key personnel

#### ANNEX D - PHOTOS

During demobilization, turn out installation phases, include photos of the progress of the work for the month (Assess if it is to substantiate invoices, monitor progress and provide visual updates to clients and site management)

<b>DID RP3.1-PD-03: Project Meeting Minutes</b>
<b><u>SOW Reference:</u></b> Scope of Services for Project Management
<b><u>Purpose:</u></b> The <i>Project Meeting Minutes</i> provide a formal record of the monthly project progress review. The purpose of this deliverable is to document discussions, decisions taken, risks, issues and actions etc.
<b><u>Related Documents:</u></b> <ul style="list-style-type: none"> <li>• DID RP3.1-PD-02 – Project Status Report</li> </ul>
<b><u>Preparation Instructions:</u></b> The Project Meeting Minutes can be prepared in the contractor's format and shall include the following items: <ul style="list-style-type: none"> <li>• Tombstone information as follows: <ul style="list-style-type: none"> <li>○ Project number as provided by PWGSC</li> <li>○ Project title as provided by PWGSC</li> <li>○ Contract number as provided by PWGSC</li> </ul> </li> <li>• Meeting specific information as follows: <ul style="list-style-type: none"> <li>○ Date, time and location of meeting</li> <li>○ Purpose of Meeting</li> <li>○ List of attendees with project role or professional title and contact information.</li> </ul> </li> <li>• Each subject discussed must include the following: <ul style="list-style-type: none"> <li>○ Item number;</li> <li>○ Outline of discussion;</li> <li>○ Actions taken;</li> <li>○ Person or organization responsible for the action; and</li> <li>○ Due date.</li> </ul> </li> <li>• Actions from previous meetings, stated and updated until the action is complete. This action log must show the person responsible for the action and its due date.</li> <li>• Details of next monthly project progress review meeting's date and time.</li> <li>• Name of the person who recorded the minutes.</li> </ul>
<b><u>Submission Purpose:</u></b> For Review.
<b><u>Frequency/Timing:</u></b> Monthly, no later than two business days after the meeting date.
<b><u>Internal Review Period:</u></b> 5 calendar days.

## **DID RP3.1-PD-04: Construction Cost Estimates**

**SOW Reference:** Scope of Services for Project Management

**Purpose:** To provide a detailed breakdown of the project's construction costs into itemized elemental costs that represent the scope of work.

The construction cost estimates shall be prepared and presented in accordance with the UniFormat II elemental costs format.

### **Related Documents:**

UniFormat is a publication available for purchase via Construction Specification Canadian or Construction Specifications Institute:

<https://www.csiresources.org/standards/uniformat>

GC Fit-up Standards:

[https://www.gcpedia.gc.ca/gcwiki/images/8/8e/Workplace\\_Fit-up\\_Standards.pdf](https://www.gcpedia.gc.ca/gcwiki/images/8/8e/Workplace_Fit-up_Standards.pdf)

GCWorkplace Design Guide:

[https://wiki.gccollab.ca/images/9/9d/GCworkplace\\_Design\\_Guide\\_EN.pdf](https://wiki.gccollab.ca/images/9/9d/GCworkplace_Design_Guide_EN.pdf)

### **Preparation Instructions:**

The following instructions apply equally to each class of estimate:

- a) Develop the construction cost estimates based on the latest design documentation as follow:
  - a. at the completion of the 33% Schematic Design, submit a Class C level construction cost estimate;
  - b. at the completion of the 66% Detailed Design, submit a Class B level construction cost estimate; and
  - c. at the completion of the 99% Final Design, submit a Class A level construction cost estimate.
- b) The cost estimates shall be based on measured quantities from the design documents and presented according to the elements as per the UniFormat II classification of construction systems and assemblies. Use the 4-level classification to organize the cost estimate. The cost estimate should provide the quantity, unit rate and cost for each of the applicable Level 4 elements.

#### **Example:**

C Interior

    C10 Interior Construction

        C1010 Interior Partitions

            C1010.10 Interior Fixed Partitions

            C1010.20 Interior Glazed Partitions

            C1010.40 Interior Demountable Partitions

<p>c) Following the guideline of the GC Workplace Fit-up Standard, identify separately within the construction cost estimates, the works according to the following components:</p> <ul style="list-style-type: none"> <li>a. Base building</li> <li>b. Fit-up funded by PSPC</li> <li>c. Fit-up funded by client(s)</li> </ul> <p>d) Provide a summary of the breakdown of the construction cost that is itemized by the 3-Level classification of UniFormat II. Use the template <i>Cost Estimate Template - RP3.x/sx</i>.</p> <p>e) If the project consists of multiple types of accommodation space, then a separate estimate is required for each type of the accommodation space. The various types of accommodation space are defined in the GC Workplace Fit-up Standard, which include:</p> <ul style="list-style-type: none"> <li>• General-purpose office</li> <li>• Ministerial and Deputy Head office</li> <li>• Quasi-judicial</li> <li>• Call/Contact Centres</li> <li>• Special Purpose space</li> </ul> <p>f) The construction cost estimates must be supported with sufficient information to provide additional contexts on the basis and scope undertaken in developing the cost estimate. At minimum, the following information shall be provided along with each cost estimate:</p> <ul style="list-style-type: none"> <li>• description of information used in developing the cost estimate including an explanation of how the cost estimate has evolved from the prior estimate, in accordance with industry standards;</li> <li>• assumptions made in deriving the cost estimate;</li> <li>• listing of notable inclusions and exclusions as applicable;</li> <li>• listing of items/issues carrying significant risk as applicable; and</li> <li>• details of any allowances and/or contingencies included in the cost estimate.</li> </ul>
<p><b><u>Submission Purpose:</u></b> For Review.</p>
<p><b><u>Frequency/Timing:</u></b> Once in conjunction with each of the respective design development deliverable.</p>
<p><b><u>Internal Review period:</u></b> 14 days, in conjunction with review of the associated design development deliverable.</p>

### **Cost Estimate Template for DID RP3.1-PD-04: Construction Cost Estimates**

## B - Uniformat Cost Summary



Public Services and  
Procurement Canada

Services publics et  
Approvisionnement Canada

Project description: e.g. name of building, address

Type of accommodation: Identify either General Purpose, Ministerial & Deputy Head, Quasi Judicial, Call Centre or Special Purpose Space

Floor Area: provide the measured gross, rentable and usable areas in metre square

Expansion Cost/Framework (ECF) refers to the expansion space or non-representing client departments that is beyond their space envelope limit and, therefore, is funded by client departments.

Uniformat Building Element / CQS Element			Costing Category					Description of Work / Notes / Additional Information
Building Elements Classification (Groups A-F)		total & sub-totals	Base Building Funded by PSPC	Base Building Funded by Client	Fit-Up funded by Client	Expansion Cost/Framework (ECF)	Fit-Up funded by PSPC	
<b>A - SUBSTRUCTURE</b>	Component Total by Category	\$0	\$0	\$0	\$0	\$0		Substructure
<b>A10 - FOUNDATIONS</b>	Total by Category	\$0	\$0	\$0	\$0	\$0		Foundations
A1010	Standard Foundation / A111 Std Foundation, A35 Ext. Projections	\$0						
A1020	Special Foundations / A112 Special Foundation	\$0						
A1030	Sub on Grade / A21 Lowest Floor Construction	\$0						
<b>A20 - BASEMENT CONSTRUCTION</b>	Total by Category	\$0	\$0	\$0	\$0	\$0		Basement Construction
A2010	Basement Excavation / A12 Basement Excavation	\$0						
A2020	Basement Walls General / A31 Walls Below Grade	\$0						
<b>B - SHELL</b>	Total by Category	\$0	\$0	\$0	\$0	\$0		Shell
<b>B10 - SUPERSTRUCTURE</b>	Component Total by Category	\$0	\$0	\$0	\$0	\$0		Superstructure
B1010	Floor Construction / A22 Upper Floor Construction	\$0						
B1020	Roof Construction / A25 Roof Construction, A35 Ext. Projections	\$0						
<b>B20 - EXTERIOR ENCLOSURE</b>	Component Total by Category	\$0	\$0	\$0	\$0	\$0		Exterior Enclosure
B2010	Exterior Walls / A32 Walls Above Grade, A35 Ext. Projections	\$0						
B2020	Exterior Windows / A33 Exterior Windows & Entrances	\$0						
B2030	Exterior Doors / A33 Exterior Windows & Entrances	\$0						
<b>B30 - ROOFING</b>	Component Total by Category	\$0	\$0	\$0	\$0	\$0		Roofing
B3010	Roof Coverings / A341 Exterior Roofing	\$0						
B3020	Roof Openings / A342 Skylights and Roof Glazing	\$0						
<b>C - INTERIORS</b>	Component Total by Category	\$0	\$0	\$0	\$0	\$0		Interiors
<b>C10 - INTERIOR CONSTRUCTION</b>	Total by Category	\$0	\$0	\$0	\$0	\$0		Interior Construction
C1010	Partitions / B11 Partitions	\$0						
C1020	Interior Doors / B12 Interior Doors	\$0						
C1030	Fittings / B31 Fittings & Fixtures (do not include B314, see E20)	\$0						
<b>C20 - STAIRS</b>	Total by Category	\$0	\$0	\$0	\$0	\$0		Stairs
C2010	Stair Construction / A222 Stair Construction	\$0						
C2020	Stair Finishes / B21 Floor Finishes	\$0						
<b>C30 - INTERIOR FINISHES</b>	Total by Category	\$0	\$0	\$0	\$0	\$0		Interior Finishes
C3010	Interior Wall Finishes / B23 Wall Finishes	\$0						
C3020	Floor Finishes / B21 Floor Finishes	\$0						
C3030	Ceiling Finishes / B22 Ceiling Finishes	\$0						
<b>D - SERVICES</b>	Total by Category	\$0	\$0	\$0	\$0	\$0		Services
<b>D10 - CONVEYING</b>	Component Total by Category	\$0	\$0	\$0	\$0	\$0		Conveying
D1010	Elevators and Lifts / B331 Elevators	\$0						
D1020	Escalators & Moving Walks / B332 Escalators & Moving Walks	\$0						
D1090	Other Conveying Systems / B333 Material Handling Systems	\$0						
<b>D20 - PLUMBING</b>	Component Total by Category	\$0	\$0	\$0	\$0	\$0		Plumbing
D2010	Plumbing Fixtures / C113 Plumbing & Drainage Fixtures	\$0						
D2020	Domestic Water Distribution / C112 Plumbing & Drainage Piping	\$0						
D2030	Sanitary Waste / C112 Plumbing & Drainage Piping	\$0						
D2040	Rain Water Discharge / C112 Plumbing & Drainage Piping	\$0						
D2090	Other Plumbing System / C111 Plumbing & Drainage Equipment	\$0						
<b>D30 - HVAC</b>	Component Total by Category	\$0	\$0	\$0	\$0	\$0		HVAC
D3010	Energy Supply or Control Plant / C13 HVAC	\$0						
D3020	Heat Generating Systems / C13 HVAC	\$0						
D3030	Cooling Generating Systems / C13 HVAC	\$0						
D3040	Distribution Systems / C13 HVAC	\$0						
D3050	Terminal & Package Units / C13 HVAC	\$0						
D3060	Controls and Instruments / C14 Controls	\$0						
D3070	Systems Testing and Balancing / C13 HVAC Equipment	\$0						
D3090	Other HVAC Systems and Equipment / C13 HVAC Equipment	\$0						
<b>D40 - FIRE PROTECTION</b>	Component Total by Category	\$0	\$0	\$0	\$0	\$0		Fire Protection
D4010	Fire Sprinklers / C102 Sprinkling and Suppression Heads	\$0						
D4020	Fire Standpipes / C102 Sprinkling and Suppression Heads	\$0						
D4030	Fire Protection Specialties / C121 Fire Protection Equipment	\$0						
D4090	Other Fire Protection / C121 Fire Protection Equipment	\$0						
<b>D50 - ELECTRICAL</b>	Component Total by Category	\$0	\$0	\$0	\$0	\$0		Electrical
D5010	Electrical Service & Distribution / C21 Service & Distribution	\$0						
D5020	Lighting and Branch Wiring / C22 Lighting, Devices & Heating	\$0						
D5030	Communications and Security / C23 Systems & Appliances	\$0						
D5090	Other Electrical Systems (Emergency) / C21 Service & Distribution	\$0						
<b>E - EQUIPMENT &amp; FURNISHINGS</b>	Total by Category	\$0	\$0	\$0	\$0	\$0		Equipment & Furnishings
<b>E10 - EQUIPMENT</b>	Total by Category	\$0	\$0	\$0	\$0	\$0		
E1010	Commercial Equipment / B32 Equipment	\$0						
E1020	Institutional Equipment / B32 Equipment	\$0						
E1030	Vehicular Equipment / B32 Equipment	\$0						
E1090	Other Equipment / B32 Equipment	\$0						
<b>E20 - FURNISHINGS</b>	Total by Category	\$0	\$0	\$0	\$0	\$0		
E2010	Fixed (Installed) Furnishings / B314 - Furnishings	\$0						
E2020	Movable Furnishings / B314 - Furnishings	\$0						
<b>F - SPECIAL CONSTRUCTION &amp; DEMOLITION</b>	Total	\$0	\$0	\$0	\$0	\$0		Special Construction and Demolition
<b>F10 - SPECIAL CONSTRUCTION</b>	Total by Category	\$0	\$0	\$0	\$0	\$0		Special Construction
F1010	Special Structures / B00	\$0						
F1020	Integrated Constructions / D22 Alterations	\$0						
F1030	Special Construction Systems / B00	\$0						
F1040	Special Facilities / B00	\$0						
F1050	Special Controls and Instrumentation / B00	\$0						
<b>F20 - SELECTIVE BLDG DEMOLITION</b>	Total by Category	\$0	\$0	\$0	\$0	\$0		Selective Demolition
F2010	Building Elements Demolition / D211 Demolition	\$0						
F2020	Hazardous Components Abatement / D212 Hazardous Materials	\$0						
<b>Building Totals:</b>		\$0	\$0	\$0	\$0	\$0	\$0	ECF Total PB-03/04/05/06/07/08/09/10/11/12/13/14/15/16/17/18/19/20/21/22/23/24/25/26/27/28/29/30/31/32/33/34/35/36/37/38/39/40/41/42/43/44/45/46/47/48/49/50/51/52/53/54/55/56/57/58/59/60/61/62/63/64/65/66/67/68/69/70/71/72/73/74/75/76/77/78/79/80/81/82/83/84/85/86/87/88/89/90/91/92/93/94/95/96/97/98/99/100

## B - Uniformat Cost Summary

Site Work (Group G) - for Infrastructure or Engineering Assets, as well as Building Periphery (not the Building itself)									
G - SITE WORK - BUILDING PERIPHERY or OTHER ASSET			Totals & Subtotals	Base Building or Other Asset funded by PSPC	Base Building or Other Asset funded by Client	Standard fit-up funded by Client	Fit-up under ECF	Fit-up funded by PSPC	Building Site work - This component is separated between the components directly related to the Crown-owned building and the remainder is assumed within the Infrastructure row within Unit F automatically, as applicable.
<b>G10 - SITE PREPARATION</b> Component Total by Category→			\$0	\$0	\$0				Site Preparation
G1010	Site Cleaning / D111 Preparation		\$0						
G1020	Site Demolition and Relocations / D111 Preparation		\$0						
G1030	Site Earthwork / D114 Landscaping		\$0						
G1040	Hazardous Waste Remediation / D112 Hazardous Materials		\$0						
<b>G20 - SITE IMPROVEMENTS</b> Component Total by Category→			\$0	\$0	\$0				Site Improvements
G2010	Roadways / D112 Hard Surfaces		\$0						
G2020	Parking Lots / D112 Hard Surfaces		\$0						
G2030	Pedestrian Paving / D112 Hard Surfaces		\$0						
G2040	Site Development / D113 Improvements		\$0						
G2050	Landscaping / D114 Landscaping		\$0						
<b>G30 - SITE MECHANICAL UTILITIES</b> Total by Category→			\$0	\$0	\$0				Site Mechanical Utilities
G3010	Water Supply / D12 Mechanical Site Services		\$0						
G3020	Sanitary Sewer / D12 Mechanical Site Services		\$0						
G3030	Storm Sewer / D12 Mechanical Site Services		\$0						
G3040	Heating Distribution / D12 Mechanical Site Services		\$0						
G3050	Cooling Distribution / D12 Mechanical Site Services		\$0						
G3060	Fuel Distribution / D12 Mechanical Site Services		\$0						
G3090	Other Site Mechanical Utilities / D12 Mechanical Site Services		\$0						
<b>G40 - SITE ELECTRICAL UTILITIES</b> Total by Category→			\$0	\$0	\$0				Site Electrical Utilities
G4010	Electrical Distribution / D13 Electrical Site Services		\$0						
G4020	Site Lighting / D13 Electrical Site Services		\$0						
G4030	Site Communications & Security / D13 Electrical Site Services		\$0						
G4090	Other Site Electrical Utilities / D13 Electrical Site Services		\$0						
<b>G90 - OTHER SITE CONSTRUCTION</b> Total by Category→			\$0	\$0	\$0				Other Site Construction
G9010	Service and Pedestrian Tunnels / none		\$0						
G9090	Other Site Systems & Equipment / none		\$0						
G9999	Land Purchase Cost / none		\$0						
<b>Site work Totals:</b>			\$0	\$0	\$0				
<b>Total Building and Site work:</b>			\$0	\$0	\$0	\$0	\$0	\$0	
<b>General Requirements, Fees, Taxes, Permits, Insurance &amp; Bonds</b>			\$0	\$0	\$0	\$0	\$0	\$0	General Requirements, Fees, Taxes, Permits, Insurance & Bonds
Z10	General requirements		\$0						
Z90	Overhead and Profit		\$0						
Z7030	License fees		\$0						
Z7050	Permit costs		\$0						
Z7019	Taxes		\$0						
<b>Total Construction excluding Contingencies:</b>			\$0	\$0	\$0	\$0	\$0	\$0	
<b>Contingencies</b>			\$0	\$0	\$0	\$0	\$0	\$0	Contingencies
Z9050.10	Design contingencies		\$0						
Z9050.50	Escalation		\$0						
<b>Total Construction including Contingencies:</b>			\$0	\$0	\$0	\$0	\$0	\$0	
				Total Base Building / Other Asset funded by PSPC	Total Base Building / Other Asset funded by Client	Total Fit-Up funded by Client		Total Fit-Up funded by PSPC	

<b>DID RP3.1-PD-05: Project-specific Health and Safety Plan</b>
<b><u>SOW Reference:</u></b> Construction Health and Safety and Occupational Health and Safety
<b><u>Purpose:</u></b> Provides all information for the effective management of health and safety on the project site. Accounts for site-access provisions including project time and space as stipulated by the Building Control Authority, and relevant building-related health and safety requirements.
<b><u>Related Documents:</u></b> <ul style="list-style-type: none"> <li>• Canada Labour Code (CLC) Part II</li> <li>• Canadian Occupational Health and Safety Regulations</li> <li>• Treasury Board Policy on Occupational Safety and Health</li> <li>• National Joint Council Occupational Health and Safety Directive</li> <li>• National Fire Code of Canada</li> </ul>
<b><u>Preparation Instructions:</u></b> Prepare a comprehensive health and safety plan which: <ul style="list-style-type: none"> <li>• accounts for the Contractor's health and safety program;</li> <li>• incorporates and is compliant with applicable legislation governing both construction health and safety and occupational health and safety; and accounts for Canada's obligations to employee occupation health and safety;</li> <li>• is tailored to the type of Work to be performed;</li> <li>• addresses all known and foreseeable hazards and risks;</li> <li>• includes the list of known hazardous substances, such as conveyed via the building's Asbestos Management Plan, as well as any substances identified via inspection and/or testing by the Contractor;</li> <li>• takes into consideration access to the Work site as defined by the Building Control Authority;</li> <li>• takes into consideration the building-specific health and safety plan, and associated procedures, practices, etc.;</li> <li>• includes as a subordinate plan a Fire Safety Plan as described in Section 5.6 Construction and Demolition Sites of the National Fire Code of Canada;</li> <li>• conveys procedures, practices, etc. to be utilized during the Work including emergency action plans/procedures for handling emergency Work where it is not practical to follow normal procedures, practices, etc.;</li> <li>• identifies relevant associated training requirements;</li> <li>• identifies personnel (and their contact information) responsible for the Plan, key stakeholders in the Plan, and associated roles and responsibilities; makes</li> </ul>

provision for communicating and sharing of the Plan with project stakeholders including subcontractors and those undertaking associated work by others; and <ul style="list-style-type: none"> <li>incorporates necessary inspections, approvals and permits from authorities having jurisdiction, the Building Control Authority, and others, such as building permits, confined space entry permits, permits for asbestos abatement Work, raised platform Work, and hot Work.</li> </ul>
<b><u>Submission Purpose:</u></b> For Information.
<b><u>Frequency/Timing:</u></b> Once, before the start of any construction.
<b><u>Internal Review Period:</u></b> Not applicable.

<b>DID RP3.1-PD-06: Reports, letters, orders, etc. as a result of contact, including site visits, by authorities having jurisdiction</b>
<b><u>SOW Reference:</u></b> Scope of Services for Construction
<p><b><u>Purpose:</u></b> To provide to the Crown notification and explanation of the results of contact, including site visits, by authorities having jurisdiction that resulted in a written warning, direction, a work stoppage, or the like.</p> <p>Depending on the nature of the interaction with the authority having jurisdiction, actions may be required within and by the Crown.</p>
<b><u>Related Documents:</u></b>
<p><b><u>Preparation Instructions:</u></b></p> <ul style="list-style-type: none"> <li>Within twenty-four hours of receipt, provide a copy of the document received from the authority having jurisdiction along with a brief memorandum detailing the interaction with the authority having jurisdiction; in the memo include:             <ul style="list-style-type: none"> <li>Date, time and location</li> <li>Name of the authority having jurisdiction</li> <li>The circumstances the led to the contact with the authority having jurisdiction</li> <li>If not obvious in the document received from the authority having jurisdiction, provide the issue(s), the authority having jurisdiction's finding, their recommendations/direction/warning's/penalties/etc., any next steps proposed or follow-up imposed, and any other relevant information</li> </ul> </li> <li>Within three business days from receipt of the document from the authority having jurisdiction, provide another memorandum giving the Contractor's</li> </ul>

<p>planned response, or if no response was deemed necessary provide an explanation of why</p> <ul style="list-style-type: none"> <li>• Provide copies of all relevant follow-up documents either send to, or received from the authority having jurisdiction within five days of issuance/receipt.</li> </ul>
<b><u>Submission Purpose:</u></b> For Information.
<b><u>Frequency/Timing:</u></b> At each occurrence, as per the timing indicated in the Preparation Instructions
<b><u>Internal Review Period:</u></b> Not applicable.

<b>DID RP3.1-PD-08: Pre-Design Findings Report</b>
<b><u>SOW Reference:</u></b>
<p><b><u>Purpose:</u></b> To provide any updated and/or new project conditions which the Contractor has found that may impact the project scope. This is relative to the Project Brief and any associated building information provided by PSPC. To identify any conditions that require further investigation/study to understand whether and what impacts these conditions may have on project scope. To provide proposed next steps and estimated costs/timelines where the Contractor identifies further investigation/study being needed.</p>
<p><b><u>Related Documents:</u></b></p> <ul style="list-style-type: none"> <li>• Technical Reference for Office Building Design</li> </ul>
<p><b><u>Preparation Instructions:</u></b></p> <ul style="list-style-type: none"> <li>• Provide in letter report format in PFD</li> <li>• Relative to the project information provided by PSPC: <ul style="list-style-type: none"> <li>○ Validate the information contained within the supplied building information with an emphasis on the Building Capacity Assessment Brief</li> <li>○ Where modifications are proposed relative to the supplied building information, provide updated and/or new project conditions including supporting technical information</li> <li>○ Identify what information needs to be updated and why</li> <li>○ Identify any further technical studies that may be required</li> <li>○ Describe the possible impacts, if any, on the project scope, timeline or budget based on updated/new information</li> </ul> </li> </ul>

<ul style="list-style-type: none"> <li>• Relative to the site and/or building conditions that require further investigation/study describe: <ul style="list-style-type: none"> <li>○ the specific conditions</li> <li>○ what specifically needs to be investigated/studied and why</li> <li>○ the possible impacts on the project scope, timeline or budget owing to the need information sought, in known</li> <li>○ the Contractor's proposed next steps and estimated timelines and cost to complete the investigation/study; note this does not constitute an offer of services – should PSPC want the Contractor to complete the additional work the contract change process and Basis of Payment will be followed.</li> </ul> </li> </ul>
<b><u>Submission Purpose:</u></b> For Information.
<b><u>Frequency/Timing:</u></b> Once, before design work is started, but no later than twenty working days from contract award.
<b><u>Internal Review Period:</u></b> Not applicable.

<b>DID RP3.1-PD-09: Design Development Packages</b>
<b><u>SOW Reference:</u></b> Scope of Services for Design
<p><b><u>Purpose:</u></b> The design documents submitted during design development and construction will serve to demonstrate to PSPC that the contractor is meeting the requirements of the SOW and the Project Brief. More specifically, the documents will serve to illustrate design development for all interior floor spaces and related architectural, mechanical, electrical and structural engineering requirements in keeping with applicable SOW requirements. Interior floor space design products will be shared with stakeholders and authorities having jurisdiction.</p>
<p><b><u>Related Documents:</u></b></p> <p>The latest version of related policy instruments, including but not limited to:</p> <ul style="list-style-type: none"> <li>• GCworkplace Technical Reference Manual</li> <li>• Building Capacity Assessment Brief</li> <li>• Technical Reference for Office Building Design</li> <li>• GCworkplace Space Planning Work Book</li> <li>• GCworkplace Design Guide</li> <li>• PSPC National CADD Standard</li> <li>• Federal Identity Program Manual</li> </ul>
<b><u>Preparation Instructions:</u></b>

For added clarity, the Contractor is always required to prepare each of the phase-specific design development packages as stated in the SOW but is required to submit as deliverables only those packages found herein. From time to time design packages for 33% Schematic Design and 100% Construction may be required by the TA as ad hoc deliverables.

Design development packages for 66% Detailed Design and 99% Final Design will include all drawings and associated specifications and reports for interior space, architectural, mechanical, electrical, structural, accessibility and information technology and infrastructure designs. A covering design summary report is required which details what is being submitted in the package; this should also summarize how any PWGSC comments received to date have been addressed. The preceding are the minimum requirements. More details for each phase-specific design development package are given below in Additional Phase-Specific Package Requirements.

At a minimum, the phase-specific design development packages submissions shall include, as is appropriate for the respective phase, the following:

- Title Sheet and Drawing Listing
- Demolition Plan
- Partition Plan
- Furniture Plan
- Reflected Ceiling Plan
- Wall Finishes Plan
- Floor Finishes Plan
- Elevations/Sections
- Detail/ Millwork Drawings
- Schedules
- Signage and wayfinding
- Architectural, Mechanical, Electrical and Structural Drawings
- As related to Shared Services Canada infrastructure, cabling and conduit, HVAC, and security.

Additionally, presentation and visualization products related to design development may be required by the Technical Authority; these and the design development phase for which they are required will be so identified in the Project Brief. These include:

- Vertical stacking diagrams
- Horizontal blocking plans
- Related public spaces
- Design presentations

## **Drawing and Document Formats**

### **Additional Phase-Specific Package Requirements**

#### **66% Detailed Design**

Submit a Detailed Design package to include:

- Floor plans of each floor showing all accommodation required with room names and calculated areas, including all necessary circulation areas, stairs, elevators, etc., and ancillary spaces anticipated for service use. Indicate building grids, modules, etc., and key dimensions;
- Cross sections through the building(s) to show floor levels, room heights, inner corridor or court elevations, etc.;
- Detail sections of walls, building envelope design features or other special design features requiring illustration and explanation at this stage, including fireproofing methods;
- All architectural, mechanical, electrical, and structural design concept documents, drawings, specifications, reports and other supporting analyses, as may be required, in sufficient detail to illustrate clearly the design intent and to demonstrate conformance with the project requirements including and not limited to: the development of client-centred concept solutions; implementation of applicable architectural and engineering standards and practices; and effective response to existing building conditions.
- Demolition plans, partition plans, reflected ceiling plans, finish schedules, interior door/window schedules etc.; and
- Preliminary partition/furniture plans that include as a minimum the following: partition locations including door swings; preliminary layouts for all furniture and furnishings in open and enclosed workpoints, support space and special purpose space; location and identification of equipment including as a minimum photocopiers, printers, fax machines; identification of all room/areas including name, room number, size; and identification of units, branches, divisions, and groups
- Provide 2 finishes and colour concept options for selection. Concept to include: paint and wall finishes, floor finishes, millwork finishes, specialty design elements (ex: acoustic panels, specialty lighting, moss walls, etc.)
- With respect to accessibility consider the tenant-specific accessibility requirements and account for this in the design of signage and wayfinding. Include a Signage Package with the proposed design options and also, bring forward recommendations that exceed the mandated minimums for the TA's consideration

Relative to what was developed in functional programming, any modifications to adjacencies, functional relationships, and horizontal and vertical stacking relationships.

### **99% Final Design**

Submit a Final Design package to include:

Final partition/furniture plans that in addition to information provided on preliminary partition/furniture plans include as a minimum the following: partition type; final layout for all furniture and furnishings in open and enclosed workpoints, support space and special purpose space; special requirements (i.e. audio visual, etc.); security requirements; and identification of special mechanical and plumbing requirements. Partition/furniture plans must be layered at a minimum as follows: New Freestanding – chairs, filing cabinets; New Systems – panels, work surfaces; and re-use of Existing Furniture – panels, work surfaces, chairs, desks, etc.

Coordinate preparation and development of Final Partition/Furniture plan with related architectural, mechanical and electrical design disciplines.

### **Design Intent Related Changes Occurring During Construction**

Any design changes occurring during construction must be identified to the TA with these changes being identified and submitted via revision to the appropriate documentation such as revised interior floor space, and related architectural, mechanical, electrical or structural, drawings and/or specifications, and/or reports, and or supporting documentation, as may be appropriate. These design changes may be subject to a technical review.

### **Drawing Requirements:**

All CADD drawings and specifications are to be prepared in accordance with “Doing Business” and PWGSC National CADD Standards.

Drawings are to be provided in PDF format and in electronic format in the most recent version of AutoCAD, when requested.

Drawings are to be consistent in sheet size.

Drawings are to be submitted as PDF's and in accordance with the BIM Modeling requirements (where identified as a requirement in the RFP); the TA may from time to time also require that drawings be submitted in CADD format.
<b><u>Submission Purpose:</u></b> For Review.
<b><u>Frequency/Timing:</u></b> For each of 66% and 99%, once at completion of each required design development phase. For design intent related changes occurring during construction, as and when required.
<b><u>Internal Review period:</u></b> 18 calendar days.

<b>DID RP3.1-PD-10: Preliminary Furniture Recommendations Report</b>
<b><u>SOW Reference:</u></b> Scope of Services for Design
<p><b><u>Purpose:</u></b> Gather, analyse and document the tenant's furniture requirements in a written and graphic format (i.e. data sheets) including, but not limited to, all workstation types and finishes, i.e. systems furniture, freestanding, soft seating and case goods. The Report is to reflect proposed furniture that meets PSPC specifications. It will be issued for review and agreement by the tenant.</p> <p>Proposed variances from the GCworkplace Standard Furniture Typical must be identified and are subject to PSPC review for compliance with the Government of Canada Workplace Fit-up Standards. Non-compliant variances may be considered and are subject to a formal review and authorization process. Non-compliant variances may not be authorized.</p>
<p><b><u>Related Documents:</u></b></p> <p>GCworkplace Standard Furniture Typicals</p> <p>Furniture Specifications</p> <p>Government of Canada Fit-up Standards</p> <p>GCWorkplace Design Guide</p>
<p><b><u>Preparation Instructions:</u></b></p> <p>a) Furniture recommendations should reflect the specifications outlined in the <i>GCworkplace Standard Furniture Typicals</i>.</p>

<ul style="list-style-type: none"> <li>b) The Report is to include a Class A cost estimate for the proposed furniture package.</li> <li>c) The Report is to include the Preliminary Furniture Plan with all workpoints tagged by name.</li> <li>d) The Report is to include one data sheet for each workpoint type. Each data sheet is to include the following: <ul style="list-style-type: none"> <li>i. Drawing of proposed furniture configuration;</li> <li>ii. Overall size of workpoint;</li> <li>iii. Worksurface &amp; panel dimensions and</li> <li>iv. Chair type.</li> </ul> </li> <li>e) Where applicable, prepare typical data sheets for each proposed variance from a workpoint typical.</li> <li>f) With respect to variances, for each one either prepare a performance specification or provide a spec sheet for the proposed furniture for all proposed non-standard products for review.</li> <li>g) The Contractor must comply with the product descriptions and technical requirements set-out within these specification on behalf of PSPC. The Contractor must reference the <i>Furniture Specifications</i> to determine applicability as per the project scope and relevant procurement methodologies to ensure best value for the Crown.</li> <li>h) The furniture selection must meet: relevant legislation, regulations, and policies, including applicable accessibility, health, safety and security requirements.</li> </ul>
<p><b>Submission Purpose:</b> For Acceptance. Acceptance of the Preliminary Furniture Recommendations Report is required before furniture acquisition/procurement proceeds.</p>
<p><b>Frequency/Timing:</b> Initially in conjunction with submission of the 66% Detailed Design drawings and specifications.</p>
<p><b>PSPC Internal Review Period:</b> 18 calendar days.</p>

<p><b>DID RP3.1-PD-11: Furniture Proposal Package</b></p>
<p><b><u>SOW Reference:</u></b> Scope of Services for Design</p>
<p><b><u>Purpose:</u></b> Document to present the Contractor's specific furniture products proposed following selection of the furniture supplier(s) but prior to acquisition. This document</p>

will include all necessary specifications for the proposed products, for review and acceptance by PWGSC.

**Related Documents:**

Preliminary Furniture Recommendations Report

**Preparation Instructions:**

- a) Prepare specifications for products not represented in the GCWorkplace Standard Furniture Typical. Provide the rationale for deviating from the Typical.
- b) Provide furniture plans which include the following:
  - a. Critical installation dimensions
  - b. Workpoint numbering and reference tag to Typical
- c) The Furniture Proposal Package is also to include:
  - a. All finishes options
- d) Product images

**Submission Purpose:** For Acceptance. Acceptance of the Furniture Proposal Package is required before furniture is ordered.

**Frequency/Timing:** Once, as soon as the Contractor has identified a supplier and the supplier's proposed products and before placing the product order.

**PSPC Internal Review Period:** 18 calendar days.

**DID RP3.1-PD-12: Furniture Deficiency Report**

**SOW Reference:** Scope of Services for Design

**Purpose:** To support the identification and correction of furniture deficiencies following installation. The report serves to coordinate deficiency identification and correction between the tenant, PSPC and the Contractor.

**Related Documents:**

DID RP3.1-PD-11: Furniture Proposal Package

**Preparation Instructions:**

- a) Once the furniture installation is complete but prior to turnover, prepare and submit an itemized listing of all deficiencies in written format including photos.

<ul style="list-style-type: none"> <li>b) Revise the listing at appropriate intervals to reflect: i. deficiencies having been corrected, and ii. new deficiencies having been identified, including those identified via PSPC and the tenant.</li> <li>c) In the revised listings, indicate the date the deficiency was corrected and briefly describe how it was corrected.</li> <li>d) Once all deficiencies have been completed, prepare and submit a final Furniture Deficiency Report.</li> </ul>
<b>Submission Purpose:</b> For information.
<b>Frequency/Timing:</b> Initially after furniture installation is complete. If and when requested by the TA to validate progress against deficiencies. Submit a final report once all deficiencies have been completed.
<b>PSPC Internal Review Period:</b> Not applicable.

<b>DID RP3.1-PD-13: CAD As-Built Drawings</b>
<b><u>SOW Reference:</u></b> Scope of Services for Design
<b><u>Purpose:</u></b> To submit the final set of drawings reflecting as-build conditions (as constructed and as installed).
<b><u>Related Documents:</u></b> <ul style="list-style-type: none"> <li>• PSPC National CADD Standard</li> <li>• PSPC CADD Standard Regional Supplements (outside the NCA)</li> </ul>
<b><u>Preparation Instructions:</u></b> <ul style="list-style-type: none"> <li>• Update the <i>100% Construction Package</i> drawings to produce the <i>As-Built Drawings</i>.</li> <li>• Drawings must be updated in computer-aided design (CAD) software; handwritten notes are not acceptable.</li> <li>• Drawings must be in native format, and a format compatible with AutoCAD®.</li> <li>• Drawings must be compliant with the most recent version of the PSPC National CADD Standard and applicable Regional Supplements.</li> <li>• Submit the electronic drawing file(s) through the Real Property Portal.</li> <li>• Complete and submit the drawing quality verification form found in Annex D—Quality control of Computer Aided Design and Drafting data in the PSPC</li> </ul>

National CADD Standard in order to verify drawing compliance with the Standard.
<b><u>Submission Purpose:</u></b> For Review.
<b><u>Frequency/Timing:</u></b> Once at Project Close-Out
<b><u>Internal Review Period:</u></b> 40 calendar days.

<b>DID RP3.1-PD-14: CAD Occupancy Floor Plans</b>
<b><u>SOW Reference:</u></b> Scope of Services for Design
<b><u>Purpose:</u></b> To submit the pre-construction and final set of drawings reflecting the occupancy layout and representing architectural and structural elements, convectors, room names, furniture type and the floor design layouts including relationships between rooms, spaces, traffic patterns, and other physical features.
<b><u>Related Documents:</u></b> <ul style="list-style-type: none"> <li>• PSPC National CADD Standard</li> <li>• PSPC CADD Standard Regional Supplements (outside the NCA)</li> </ul>
<b><u>Preparation Instructions:</u></b> <ul style="list-style-type: none"> <li>• Drawings must represent architectural and structural elements, convectors, room names, furniture type and the floor design layouts.</li> <li>• Drawings must be produced and updated in computer-aided design (CAD) software; handwritten notes are not acceptable.</li> <li>• Drawings must be in native format, and a format compatible with AutoCAD®.</li> <li>• Drawings must be compliant with the most recent version of the PSPC National CADD Standard and applicable Regional Supplements.</li> <li>• Drawings' element accuracy must be within following acceptable tolerance: <ul style="list-style-type: none"> <li>○ 30 millimetres on measurements of 30 metres or more when compared to true conditions for overall building envelope elements and;</li> <li>○ 25 millimetres when compared to true conditions.</li> </ul> </li> <li>• Submit the electronic drawing file(s) through the Real Property Portal.</li> <li>• Complete and submit Annex D – Quality control of Computer Aided Design and Drafting data in the PSPC National CADD Standard in order to verify drawing compliance with the Standard.</li> </ul>
<b><u>Submission Purpose:</u></b> For Review.

**Frequency/Timing:** Once, in conjunction with the Construction Package - 100% design development stage; and again at Project Close-Out.

**Internal Review Period:** 40 calendar days.

### **DID RP3.1-PD-19: Conservation Approach Brief (CAB)**

**SOW Reference:** Stewardship of Federal Heritage Buildings

**Purpose:** The goal of the CAB, which has been initially completed at the identification/definition phase of the project by PWGSC, is to determine and report the approach to be taken to protect the heritage values and character-defining elements of a Federal Heritage Building and its designated grounds, for conservation projects that are anticipated to impact these attributes and movable heritage assets, when present (positively and negatively). This deliverable is required for all conservation projects in Federal Heritage Buildings.

Therefore updates of the initial CAB by the Contractor are required to ensure that new evidence, information and constraints are being captured and considered in the design development.

This deliverable also serves to assist in the review of the design development documents by PWGSC.

#### **Related Documents:**

- RPS Policy on the Stewardship of Federal Heritage Properties
- RPB Procedure for the Stewardship of Federal Heritage Buildings
- PCA's Standards and Guidelines for the Conservation of Historic Places in Canada

#### **Preparation Instructions:**

- Update the initial CAB based on new information, evidence and/or constraints, at each design development phase (33%, 66%, 99%, 100%), and at the end of the project; the initial CAB, developed by PWGSC, is provided in the Project Brief;
- Ensure that the updated CAB:
  - is consistent with the conservation requirements and related obligations stated in the above Related Documents;
  - suits the evolving project scope up to the completion of the project;
  - describes the overall project-specific conservation approach; and all heritage conservation treatments applicable to the proposed project,

<p>anticipating the scope of works described in the Project Brief, any changes or updated identified through the Pre-Design Findings Report, and/or during design development; and</p> <ul style="list-style-type: none"> <li>○ takes into account anticipated measures to protect designated landscapes, as well as site and work-location access areas, inside and outside the asset.</li> <li>• Submit the updated CAB to the TA at each set of applicable design development phases (33%, 66%, 99%, 100%), and at the end of the project.</li> </ul>
<p><b><u>Submission Purpose:</u></b> For Acceptance. There shall be no construction until the Plan has been accepted. Further, where the CAB needs to be updated during the course of construction, such as to adjust for unforeseen site conditions, construction shall stop while the updated CAB is prepared and reviewed (this situation should be immediately brought to the attention of the TA so that they are aware construction has been stopped and the circumstances around the stoppage). Construction also includes physical changes to the asset that may be necessary during design development; for example opening walls to investigate existing site conditions.</p>
<p><b><u>Frequency/Timing:</u></b> Once, in conjunction with the 33% Schematic Design submission; thereafter in conjunction with the remaining phase-specific design development packages whenever there is change in project scope; and again at the end of the project.</p>
<p><b><u>Internal Review Period:</u></b> 18 calendar days, in conjunction with review of phase-specific design development packages.</p>

<p><b>DID RP3.1-PD-20: Movable Heritage Protection Measures Plan</b></p>
<p><b><u>SOW Reference:</u></b> Stewardship of Federal Heritage Buildings</p>
<p><b><u>Purpose:</u></b> To determine and report the measures to be taken to protect the heritage value and integrity (from damage and/or deterioration) of movable heritage assets contained within the built federal asset and on the asset's grounds that may or may not have heritage designation. The Movable Heritage Asset Protection Plan is required for projects where the Project Brief contains a listing of movable heritage assets and for projects that are anticipated to impact these movable heritage assets (positively and negatively).</p> <p>This also serves to assist in the review of the design development documents by PWGSC.</p>
<p><b><u>Related Documents:</u></b></p> <ul style="list-style-type: none"> <li>• TB Guide to the Management of Movable Heritage Assets</li> </ul>

- RPS Policy on the Stewardship of Federal Heritage Properties
- RPB Procedure for the Stewardship of Federal Heritage Buildings
- RPB Management of Cultural Property Best Practice
- PCA's Standards and Guidelines for the Conservation of Historic Places in Canada

**Preparation Instructions:**

- Prepare a Movable Heritage Asset Protection Plan that is consistent with the conservation requirements and related obligations stated in the above Related Documents; and
- Ensure that the Plan:
  - lists the movable heritage assets contained within the built federal asset and on the asset's grounds impacted by the work;
  - describes the overall project-specific and movable asset-specific protection approach;
  - briefly describes all heritage protection measures applicable to the proposed project, anticipating the scope of works evolved from the Project Brief, and any changes or updates identified through the Pre-Design Findings Report, and/or during design development; and
  - takes into account anticipated measures to protect movable assets within site and work-location access areas, inside and outside the asset; the Plan may include appropriate and temporary off-site storage, if necessary.

**Submission Purpose:** For Acceptance. There shall be no physical manipulation of the movable heritage asset, nor construction adjacent to the movable heritage asset until the Plan or updated Plan has been accepted or re-accepted.

**Frequency/Timing:** Once, in conjunction with the 33% Schematic Design submission; thereafter whenever there is change in project scope, and an associated need to update the Plan, or wherever the Contractor updates the Plan.

**Internal Review Period:** 18 calendar days, in conjunction with review of phase-specific design development packages.

**DID RP3.1-PD-21: Heritage Conformity Form**

**SOW Reference:** Stewardship of Federal Heritage Buildings

**Purpose:** To report on the consideration given to the mandatory tasks/activities related to the Contractor's heritage conservation engagement, and the impacts of the work on the heritage character of the Federal Heritage Building to ensure the building's protection from damage and/or deterioration during project implementation.

Also, where applicable, to provide the reasons why the Contractor does not follow the mandatory tasks/activities/measures indicated in the Form, in particular, when not seeking and/or not following the heritage conservation recommendations of the FHBRO and/or heritage conservation experts related to the Conservation Approach Brief (CAB), that is, when compliance with the TB and RPS Policies cannot be achieved. The Contractor's request to undertake work counter to the recommendations must be documented using the Form.

To ensure that heritage conservation experts are engaged to advise on the new evidence, information and constraints being captured in the CAB and on their impact on the heritage character of the building, and if considered in the design development.

Finally, to assist in the review of the design development documents by PWGSC.

**Related Documents:**

- RPS Policy on the Stewardship of Federal Heritage Properties
- RPB Procedure for the Stewardship of Federal Heritage Buildings
- PCA's Standards and Guidelines for the Conservation of Historic Places in Canada

**Preparation Instructions:**

- Complete and thereafter update the Heritage Conformity Form at each design development phase (33%, 66%, 99%, 100%), and at the end of the project;
- Prior to submittal to the TA, ensure that the Form:
  - identifies whether each mandatory heritage conservation task was considered or not; and
  - provides the reasons/justifications for not addressing or considering the heritage conservation task(s), and where applicable the reasons why the contractor does not follow the heritage conservation recommendations as stated in the above Related Documents: reasons/justifications shall be provided for each one individually and shall relate to the Conservation Approach Brief (CAB);
- Submit the signed Form together with the updated CAB, at each set of applicable design development phases (33%, 66%, 99%, 100%), and at the end of the Delivery/Execution phase.

**Submission Purpose:** For Acceptance. See also the Submission Purpose of the CAB. Where the Form proposes that heritage conservation recommendations of the FHBRO and/or heritage conservation experts, this being related to the CAB, not be followed or cannot be achieved, there shall be no construction until the Form has been accepted. Further, where the Form needs to be updated during the course of construction, such as to adjust for unforeseen site conditions, construction shall stop while the updated Form is prepared and reviewed (this situation should be immediately brought to the attention of the TA so that they are aware construction has been stopped and the circumstances around the stoppage). Construction also includes physical changes to the asset that may be necessary during design development; for example opening walls to investigate existing site conditions.

**Frequency/Timing:** Once, in conjunction with the 33% Schematic Design submission; thereafter in conjunction with the remaining phase-specific design development packages whenever there is change in project scope; and at the end of the project.

**Internal Review period:** 18 calendar days, in conjunction with review of phase-specific design development packages.

**DID RP3.1-PD-22:** Project Sustainability Strategy (*includes Project Sustainability Planning and Tracking Tool*)

**SOW Reference:** Environmental Protection and Sustainable Development

**Purpose:** Develop and deliver a project specific sustainability strategy integrated as an overarching driver to advance innovative strategies that will enable applicable Departmental and Government-wide commitments to be met or exceeded, resulting in a project design supporting the adoption of resilient, healthy and sustainable places.

**Related Documents:**

PSPC, Real Property Sustainability Handbook

PSPC Project Sustainability Planning and Tracking Tool – to be provided in the Project Brief where required

**Preparation Instructions:**

Sustainability objectives and innovative strategies must be integrated throughout the evolution of the project, balancing environmental, social and economical values and impacts for smarter, healthier and more productive workplaces. All other functional program, design development and construction documents, including descriptive reports, floor plans, drawings and specifications that are outlined in the other DIDs, must be completed in alignment with, and accurately reflect, the goals and objectives

to be met and the design strategies to be developed as a part of the Project Sustainability Strategy DID.

In accordance with the commitments and performance targets listed in the most current version of the PSPC Real Property Sustainability Handbook, the Contractor must produce a project specific Sustainability Strategy. This document will also be guided by any other project-specific sustainability requirements where detailed in the Project Brief, and confirmed in the initial PSPC Project Sustainability Planning and Tracking Tool (Tracking Tool). The Strategy will be submitted with the Tracking Tool for review by PSPC at 33% Schematic Design. Thereafter the Strategy is to be updated as may be needed through the design development phase. The advancement of the Strategy shall be reported to the TA through the Tracking Tool at 66% Detailed Design and 99% Final Design. The final Project Sustainability Strategy and Tracking Tool will be submitted at Project Close Out.

- a. The Project Sustainability Strategy must include confirmation of the project's high level sustainability objectives and performance targets, as defined in the Project Brief and as outlined in the initial Project Sustainability Planning and Tracking Tool, and must meet or exceed applicable PSPC standards and sustainability commitments.
- b. The Project Sustainability Strategy must also identify and clearly detail through narrative, as a part of the descriptive design report, the project's specific sustainability design strategies to meet these objectives and targets.
- c. The Project Sustainability Strategy must document and confirm with each required and updated submission the design decisions, anticipated performance changes, recommendations, limitations and any follow-up required that enables these objectives and certification requirements to be achieved.
- d. As component parts of the Project Sustainability Strategy, the Contractor must complete and update with each required submission the PSPC Project Sustainability Planning and Tracking Tool template and, where applicable, the Third Party Sustainability Standard Certification for Projects scorecard that will be completed as part of the certification process (see DID RP3.1-PD-23).
- e. Where third party sustainability standard certification is required, the Strategy should not be limited to nor defined by the credits/measures identified in the chosen certification tool(s) alone. These performance assessment and certification tools are guides to verify an industry recognized level of performance, but it should not define the sustainable design or delivery of the project. There may be innovative opportunities beyond those defined in the tool that are worth exploring, as well as credits where compliance proves too challenging but whose intent can be met anyway.
- f. Where third party sustainability standard certification is required, the Contractor must identify in the Project Sustainability Strategy the most appropriate sustainability certification system(s) to be applied and the performance level

<p>that is to be targeted, that can best support the project's sustainability objectives.</p> <p>g. The Contractor must also ensure the requirements and design strategies identified in the Project Sustainability Strategy are translated and reflected accordingly into the Contractor's project sustainability specifications.</p> <p>h. At project close out, the Contractor will update and submit the Project Sustainability Strategy to include the final Project Sustainability Planning and Tracking Tool to demonstrate and verify fulfillment of the sustainability commitments, performance targets and/or provide explanation of any variance thereof.</p>
<b>Submission Purpose:</b> For Review.
<b>Frequency/Timing:</b> Project Sustainability Strategy and Tracking Tool at 33% Schematic Design. Tracking Tool only at 66% Detailed Design and 99% Final Design. Final Project Sustainability Strategy and Tracking Tool at Project Close Out.
<b>Internal Review Period:</b> 18 calendar days.

<b>DID RP3.1-PD-23:</b> Third Party Sustainability Standard Certification for Projects
<b><u>SOW Reference:</u></b> Environmental Protection and Sustainable Development
<b><u>Purpose:</u></b> Obtain sustainability standard certifications for applicable projects, as defined in the Real Property Sustainability Handbook, using industry-recognized certification programs to meet or exceed PSPC commitments and support the adoption of resilient, healthy and sustainable places.
<b><u>Related Documents:</u></b> PSPC, Real Property Sustainability Handbook PSPC Project Sustainability Planning and Tracking Tool – to be provided in the Project Brief where required
<b><u>Preparation Instructions:</u></b> <p>a) In accordance with the project sustainability certification commitments and requirements listed in the most current version of the PSPC Real Property Sustainability Handbook, the contractor must apply for and obtain, on behalf of PSPC, certification(s) for the Project under an industry recognized sustainability certification program(s) prior to the expiration of the warranty period. The Contractor should reference the RP Sustainability Handbook to determine applicability as per project scope and relevant industry-recognized certification programs for use.</p>

<p>b) The Contractor will be responsible for all certification tasks, including preparation of documentation and all submissions required for verification and final certification with the governing third party authority, and must balance the requirements of the rating systems' prerequisites and credits with other project requirements.</p> <p>c) The Certification measure/credits pursued should enable the project to meet or exceed PSPC sustainable development commitments and priorities and support the project's sustainability objectives and performance targets outlined in the PSPC Sustainability Handbook and the Project Sustainability Charter and Report.</p> <p>d) The Contractor will provide all final and official certification documents and scorecards confirming the final certification achieved and verified by the governing third party authority.</p>
<b>Submission Purpose:</b> For Information.
<b>Frequency/Timing:</b> Once, at Project Close-Out.
<b>Internal Review Period:</b> 18 calendar days

<b>DID RP3.1-PD-24: Evaluate Project GHG Emissions</b>
<b>SOW Reference:</b> Environmental Protection and Sustainable Development
<b>Purpose:</b> Evaluate that the project's greenhouse gas (GHG) emissions reduction complies to design target set in the PSPC IAR/Business Case.
<p><b>Related Documents:</b></p> <ul style="list-style-type: none"> <li>• Guideline – Project GHG Options Analysis Methodology (July 2020)</li> <li>• Greening Government Strategy (<a href="https://www.canada.ca/en/treasury-board-secretariat/services/innovation/greening-government/strategy.html">https://www.canada.ca/en/treasury-board-secretariat/services/innovation/greening-government/strategy.html</a>)</li> </ul>
<p><b>Preparation Instructions:</b></p> <p>A GHG emissions evaluation report template will be provided in the Project Brief, as part of the Request for Proposal. The report template will include the GHG emission performance target established in the IAR/Business Case, the project scope, capital and lifecycle cost. The Contractor will confirm that the final project design meets each of these parameters by:</p> <ul style="list-style-type: none"> <li>- Estimating the annual energy consumption, energy costs and GHG emissions of the project design. If the project design is multi-disciplinary in nature (i.e. the project impacts more than one building element that affects the building's energy consumption) then energy modelling and simulation of the project</li> </ul>

design is required. However, if the project is single disciplinary (i.e. only one building element that impacts energy use is affected) simpler assessment tools to estimate the element's energy consumption can be used.

- Ensuring that the project's estimated energy consumption, energy costs and GHG emissions meet or surpass the targets in the IAR/Business Case.
- Determining the capital and lifecycle cost of the project design.

Supporting material used to validate that the project design complies with the GHG emission performance target must also be submitted (ex. energy simulation file, GHG emissions calculation spreadsheet, lifecycle costing workbook).

**Submission Purpose:** For Review.

**Frequency/Timing:** Once, at 99% Final Design.

**Internal Review Period:** 12 calendar days.

#### **DID RP3.1-PD-25: Construction, Renovation and Demolition (CRD) Waste Management Plan**

**SOW Reference:** Environmental Protection and Sustainable Development

**Purpose:** Develop and implement a CRD Waste Management Plan to maximize waste prevention and diversion opportunities, diverting at least 90% of the non-hazardous CRD materials from landfill through reduction, re-use and recycling, including innovative solutions on packaging and plastics.

**Related Documents:**

PSPC, Real Property Sustainability Handbook

PSPC CRD Waste Management Key Actions Checklist

**Preparation Instructions:**

In accordance with the most current version of the PSPC Real Property Sustainability Handbook the contractor must complete and implement a CRD Waste Management Plan for all new construction, renovation, fit-up and demolition projects greater than \$1 million, to maximize waste reduction, reuse and recycling opportunities where the infrastructure exists.

This requirement exists by regulation in the province of Ontario for projects greater than 2000 meters squared (O.Reg. 102/94 and 103/94) and by policy for the rest of Canada. Projects must achieve a minimum landfill diversion rate of 75%, while striving to reach the 2030 Government of Canada target of 90% diversion.

The Contractor must complete and implement the CRD Waste Management Plan which will include the following components as detailed below. Consult the PSPC CRD Waste Management Key Actions Checklist to plan and track progress as required. The resulting deliverables will be submitted for review as directed in the SDRL.

- 1) The Site Specific CRD Waste Management Plan must include a Waste Audit and Waste Reduction Work Plan prepared and submitted for review with the 100% Construction Package:
  - a. Waste Audit – Identify and quantify the various types and weights 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. Although PSPC has committed to a diversion target of 90%, all efforts should be made to maximize waste avoidance and diversion, setting a project-specific target based on the results of the Waste Audit.
  - b. Waste Reduction Work Plan – Identify the overall waste diversion goal and material specific diversion targets. Describe project specific procedures to maximize the recovery of those materials identified in the Waste Audit. The Waste Reduction Work Plan must also include recommendations for the Material Source Separation Program that details on-site sorting and labeling practices, tracking and reporting procedures and destinations for the materials recovered to be implemented during the construction phases of the project. The Waste Reduction Work Plan must include plans for communication and training of on-site personnel to successfully implement the CRD Waste Management Plan.
- 2) Using National Master Specification prepare a Waste Management Specification(s) reflecting non-hazardous waste management requirements and maximizing waste diversion potential to direct the reuse, recycling and final disposition of project waste materials. This shall include the *NMS Specification 01 74 21 for Construction/Demolition Waste Management and Disposal*.
- 3) The Contractor must implement and verify the CRD Waste Management Plan by tracking and reporting on achieved waste diversion efforts and final results. The final waste diversion results shall be reported in a Final Waste Diversion Summary Report, as a component part of the CRD Waste Management Plan, to be confirmed at Project Close-Out. The intention of the Final Waste Diversion Summary Report is to demonstrate and declare fulfillment of all waste management plan requirements, targets and/or provide explanation of any variance. It documents the recovered construction materials, compiling and tracking weigh bills and hauling records throughout the project to confirm the quantities (percentage and tonnage) anticipated in the Waste Audit and

Waste Reduction Work Plan were achieved. The project's Final Waste Diversion Summary Report must include, at minimum, the information in the following table.

Final Waste Diversion Summary Report Components		
	Component	Description
1	Project Overview and Basic Site Descriptions	A concise, clear text summary of the general survey findings, including any compliance concerns with respect to applicable federal and provincial regulations and recommendations for urgent remedial work, including cost estimates.
2	Waste Diversion Methodology	A brief description of the methods used, including sampling, analytical testing, and any use of specialized equipment. This should include a copy of the Waste Audit and Waste Reduction Work Plan.
3	Summary of results	<ul style="list-style-type: none"> <li>• Actual material quantities/percentages reduced, reused, recycled and sent to landfill.</li> <li>• Final waste diversion rate achieved.</li> <li>• Comparison of results to initial waste audit projections and project diversion goals.</li> <li>• Explanation of variance.</li> <li>• Information about the condition of the reusable and recyclable materials upon shipping and receiving.</li> </ul>
4	Issues, lessons learned, recommendations	<ul style="list-style-type: none"> <li>• List of issues and resolutions.</li> <li>• Comments from on-site workers and suggestions for improving future CRD waste management efforts.</li> <li>• Recommendations for the disturbance, handling and disposal of each substance identified, with particular emphasis placed on future reuse, reduction, and recycling options.</li> </ul>
5	Appendices	<ul style="list-style-type: none"> <li>• All necessary supporting documentation (Materials Tracking Forms and waybills, pictures from on-site sorting, communication, etc.).</li> </ul>

**Submission Purpose:** For Review.

**Frequency/Timing:** Once with the 100% Construction Package for the Waste Audit, Waste reduction Work Plan and Waste Management Specification(s); and at Project Close-Out for the Final Waste Diversion Summary Report.

<b>Internal Review Period:</b> 18 calendar days.
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<b>DID RP3.1-PD-26: Asbestos Control Plan</b>
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<b><u>SOW Reference:</u></b> Construction Health and Safety and Occupational Health and Safety
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<b><u>Purpose:</u></b> The <i>Asbestos Control Plan</i> identifies the type of asbestos-containing material present in the project area, and the precautions to be followed to ensure containment and removal in compliance with regulations. The purpose is to ensure that appropriate controls are put in place to address the hazards.
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<b><u>Related Documents:</u></b>
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- |   |
|---|
| <ul style="list-style-type: none"><li>• Canadian Occupational Safety and Health Regulations</li><li>• PSPC Asbestos Management Standard</li><li>• National Master Specifications (NMS) for asbestos</li><li>• Applicable Provincial Legislation</li></ul> |
|---|

<b><u>Preparation Instructions:</u></b> Prepare the Asbestos Control Plan in accordance with the most current version of PSPC <i>Asbestos Management Standard</i> (see Section 6.2.9 for “control plan”) and referencing the three NMS asbestos abatement specifications. Identify the procedures to be used and worker health and safety protocols. Submit to the technical authority prior to the start of construction and make available upon request.
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Submission Purpose: For Information
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Frequency/Timing: Once, prior to the start of construction.
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Internal Review Period: 18 calendar days
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<b>DID RP3.1-PD-27: Items required under section 10.4 of COSHR to support a Hazard Investigation</b>
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<b><u>SOW Reference:</u></b> Construction Health and Safety and Occupational Health and Safety
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<b><u>Purpose:</u></b> The Hazard Investigation is required when building occupants and employees are potentially exposed to a hazardous substance discovered or unintentionally disturbed during a project. The purpose is to identify the hazardous
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substance and ensure that appropriate controls are put in place to eliminate or reduce exposure.

**Related Documents:**

- Canadian Occupational Safety and Health Regulations
- American Conference of Governmental Industrial Hygienists (ACGIH), TLVs and BEIs Book
- Applicable National Master Specifications (NMS)
- Applicable Provincial Legislation

**Preparation Instructions:** Have a qualified person investigate the possible exposure to the identified hazardous substance(s) and prepare documents in accordance with the most current version of PSPC policy requirements and applicable NMS specifications. Submit to the TA when requested.

Submission Purpose: For Information

Frequency/Timing: Once, in conjunction with the 66% Detailed Design submission.

Internal Review Period: 18 calendar days

**DID RP3.1-PD-28: Asbestos Containment System Air Samples**

**SOW Reference:** Construction Health and Safety and Occupational Health and Safety

**Purpose:** The asbestos containment air samples are a requirement of asbestos abatement projects. The purpose is to ensure that appropriate controls are put in place to confirm the containment of asbestos fibers throughout the project.

**Related Documents:**

- Canadian Occupational Safety and Health Regulations
- PSPC Asbestos Management Standard
- National Master Specifications (NMS) for asbestos
- Applicable Provincial Legislation

**Preparation Instructions:** prepare the containment air sampling instructions in accordance with the most current version of PSPC *Asbestos Management Standard*. Ensure the samples are taken daily outside the enclosure, if action level is exceeded

ensure corrective measures are taken before work recommences. Submit the sampling results daily to the TA. Post results in a conspicuous place at the workplace.
Submission Purpose: For Information
Frequency/Timing: As may be required, daily during asbestos abatement work.
Internal Review Period: 18 calendar days

<b>DID RP3.1-PD-29: Asbestos Clearance Air Samples</b>
<b><u>SOW Reference:</u></b> Construction Health and Safety and Occupational Health and Safety
<b><u>Purpose:</u></b> The asbestos clearance air samples are a requirement at the conclusion of an abatement projects. The purpose is to confirm the complete remediation and removal of asbestos-containing material prior to the dismantlement of the enclosure.
<b><u>Related Documents:</u></b> <ul style="list-style-type: none"> <li>• Canadian Occupational Safety and Health Regulations</li> <li>• PSPC Asbestos Management Standard</li> <li>• National Master Specifications (NMS) for asbestos</li> <li>• Applicable Provincial Legislation</li> </ul>
<b><u>Preparation Instructions:</u></b> prepare the clearance air sampling instructions in accordance with the most current version of PSPC <i>Asbestos Management Standard</i> . Once a thorough cleaning and lock down has been applied ensure that aggressive samples are taken within the enclosure. Enclosure will not be dismantled until air samples results are within acceptable limits. Submit the sampling results within 24 hours to the TA. Post results in a conspicuous place at the workplace.
Submission Purpose: For Information
Frequency/Timing: As may be required, within 24 hours of receipt of clearance air sample results.
Internal Review Period: 18 calendar days

**DID RP3.1-PD-30: Legionella System Risk and Hazard Assessment Form**

**SOW Reference:** Construction Health and Safety and Occupational Health and Safety

**Purpose:** The Legionella System Risk and Hazard Assessment Form identifies Legionella bacteria growth and transmission risks and hazards for building equipment and systems. The purpose is to ensure that appropriate controls are put in place to address the identified hazards.

**Related Documents:**

- PSPC Standard MD-15161, *Control of Legionella in Mechanical Systems*

**Preparation Instructions:**

For each Legionella system affected by the project complete a Legionella risk and hazard assessment during the design phase using form LBCMP-6 from the PSPC Standard MD-15161, *Control of Legionella in Mechanical Systems*.

**For Low Risk**

Review and update the assessment form at completion of construction based on actual installed conditions and submit the completed form to TA during project close-out.

**For Medium Risk**

Identify alternative design opportunities to mitigate risks.

- If alternative design options are not selected,
  - Review and update the assessment form at completion of construction based on actual installed conditions and submit the form to the TA during Project close-out including a list of potential measures to mitigate the risks.
- If alternative design options are selected,
  - Review and update the assessment form at completion of construction based on actual installed conditions and submit to the TA during Project close-out.

**For High Risk**

Identify alternative design opportunities to mitigate risks.

- If alternative design options are not selected,
  - Review and update the assessment form at completion of construction based on actual installed conditions and submit the

<p>form to the TA during Project close-out including a list of potential measures to mitigate the risks.</p> <ul style="list-style-type: none"> <li>• If alternative design options are selected, <ul style="list-style-type: none"> <li>○ Review and update the assessment form at completion of construction based on actual installed conditions and submit to the TA during Project close-out.</li> </ul> </li> </ul>
Submission Purpose: For Review
Frequency/Timing: Initially, in conjunction with the 66% Detailed Design submission; and again at project close-out.
Internal Review Period: 18 calendar days

<b>DID RP3.1-PD-31: Project Specific Indigenous Participation Plan and Amendments</b>
<b><u>SOW Reference:</u></b> Social Procurement
<b><u>Purpose:</u></b> To propose the Contractor's initial Project Specific Indigenous Participation Plan, and amendments to the Contractor's Project Specific Indigenous Participation Plan when desired. Amendments may be proposed at any time during the Contract.
<b><u>Related Documents:</u></b> Annex B, Social and Indigenous Procurement
<p><b><u>Preparation Instructions:</u></b></p> <p>Initial Project Specific Indigenous Participation Plan:</p> <p>The Contractor must tailor their approach to Indigenous participation specific to each project, drawing upon their overarching Indigenous Participation Plan, and consider and adjust the Plan for the nuances of each project.</p> <p>The overarching Indigenous Participation Plan is the Plan submitted thirty days after issuance of the Contractor's Supply Arrangement, as amended thereafter to account for PWSCG feedback.</p> <p>The Contractor must refer to Annex B, Social and Indigenous Procurement, and more specifically the Guided Document.</p> <p>Project Specific Indigenous Participation Plan amendments:</p> <p>For amendments to the Contractor's Project Specific Indigenous Participation Plan, use the same format.</p> <p>Amend the Project Specific Indigenous Participation Plan.</p>

<p>Re-date the Project Specific Indigenous Participation Plan.</p> <p>State who prepared the amended Project Specific Indigenous Participation Plan and who signed-off.</p> <p>At the beginning of the amended Project Specific Indigenous Participation Plan insert a new section titled "Proposed Amendment" which details the proposed amendment(s). In this section:</p> <ul style="list-style-type: none"> <li>• Indicate very specifically what is proposed to be changed in the Project Specific Indigenous Participation Plan and a justification for the change(s)</li> <li>• provide the anticipated impacts to the Project Specific Indigenous Participation Plan's results owing to the change(s); for example, it may be necessary to restate the proposed benefits-related actions and sub-results that the Contractor proposed in their original Project Specific Indigenous Participation Plan</li> </ul> <p>Canada is under no obligation to agree to the proposed Project Specific Indigenous Participation Plan amendment regardless of its content or justification.</p>
<p><b><u>Submission Purpose:</u></b> For Review.</p>
<p><b><u>Frequency/Timing:</u></b> Initially within 15 days of Contract issuance. For amendments, as and when required.</p>
<p><b><u>Internal Review Period:</u></b> 14 calendar days.</p>

<p><b>DID RP3.1-PD-32: Indigenous Participation Plan Reporting</b></p>
<p><b><u>SOW Reference:</u></b> Social Procurement</p>
<p><b><u>Purpose:</u></b> To provide quarterly progress reporting during the project and final reporting on the results of implementation of the Contractor's Project Specific Indigenous Participation Plan (CSIPP).</p>
<p><b><u>Related Documents:</u></b> None</p>
<p><b><u>Preparation Instructions:</u></b></p> <p>All reports must:</p> <ul style="list-style-type: none"> <li>• state whether the report is a quarterly progress report (produced and submitted quarterly, with quarterly meaning relative to the date that the Contract was issued by PWGSC), or the final report (at the end of the project/Contract); the report titles shall be: <ul style="list-style-type: none"> <li>○ Indigenous Participation Plan Reporting - Quarterly Progress Report</li> <li>○ Indigenous Participation Plan Reporting - Final Project Report</li> </ul> </li> <li>• give the date of the report and the period of time covered by the report</li> <li>• state who prepared the report and who signed-off the report</li> <li>• restate the proposed Indigenous Benefits-related actions and sub-results that the Contractor proposed in their CSIPP or amended CSIPP (if the report is relative to an</li> </ul>

amended CSIPP provide the date of the amended CSIPP); these are the baselines against which reporting should be done

Quarterly Progress Reports must:

- using the dollar value of the benefits achieved, give the individual accomplishments to-date against each of the CSIPP's opportunity areas (report utilizing Table A – E below) along with the associated activities and/or efforts made towards the results; results includes labour, training, goods and services acquired from Indigenous firms (including subcontracting), as well as for other measures benefiting Indigenous Peoples and communities
- state whether or not the sub-results for each opportunity area and aggregate results (all opportunity areas totalled) are on target (i.e. relative to the CSIPP) to be realized
- provide an assessment as to the quality of the benefits achieved; provide statements as to how these conclusions were arrived at
- where deemed relevant to the final results, explain any actions proposed in order to get sub-results or aggregate results back on target

The Final Project Report must:

- using the dollar value of the benefits achieved, give the individual results to completion against each of the CSIPP's opportunity areas (report utilizing Table A – E below) along with the associated activities and/or efforts made towards the results; results includes labour, training, goods and services acquired from Indigenous firms (including subcontracting), as well as for other measures benefiting Indigenous communities
- state the final sub-results for each opportunity area and aggregate results (all opportunity areas totalled) achieved
- provide an assessment as to the quality of the benefits achieved; provide statements as to how these conclusions were arrived at, and provide the supporting analysis
- provide any lessons learned including evolving Indigenous Benefits that future IPP's could benefit from

Assessments of the quality of the benefits achieved shall speak to the lasting, sustainable and meaningful nature of the benefits.

Report individual results for each of the CSIPP's opportunity areas using the following tables:

A) Indigenous Project Resources Employed by the Contractor

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


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

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

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

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

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

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

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

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

**Submission Purpose:** For Review.

**Frequency/Timing:** Quarterly Progress Reports – within thirty days of the end of the quarter relative to the date the Contract was signed. Final Project Report – within thirty days of contract completion.

**Internal Review Period:** 14 calendar days.

<b>DID RP3.1-PD-34: Commissioning Packages</b>
<b><u>SOW Reference:</u></b> Commissioning of Projects
<b><u>Purpose:</u></b> Verification of effective consideration of all applicable O&M aspects during the commissioning process and record keeping.
<b><u>Related Documents:</u></b> <ul style="list-style-type: none"> <li>• Real Property Branch Commissioning Policy</li> <li>• Real Property Branch Commissioning Standard</li> <li>• PWGSC Commissioning Guidelines, CP-2 to CP-13</li> <li>• CSA Z320: Building Commissioning Standard &amp; Check Sheets</li> <li>• CAN/ULC S-1001 Integrated Systems Testing of Fire Protection and Life Safety Systems</li> <li>• Technical Reference for Office Building Standard Design</li> </ul>

**Preparation Instructions:**

Depending on the extent of the required base building work for each project, some or all of the following deliverables will be required to be submitted. The requirements for each project will be found in that project's RFP and Project Brief. Where required, the following commissioning documentation will be submitted in packages in PDF format throughout the project:

At 66% Detailed Design the Commissioning Package includes:

- Commissioning Brief
- Commissioning Plan
- Commissioning Schedule
- Commissioning Deliverables List
- Commissioning drawings and specifications, and other related supporting documentation

At 99% Final Design the Commissioning Package includes:

- Commissioning Plan

Sixty calendar days prior to starting any commissioning, or commissioning verification, the Commissioning Package includes:

- Relative to the prior submission, any amended documents
- Report on the Contractor submittals and key shop drawings
- Commissioning Manual
- Commissioning Training Plan
- Contractor Start-up Procedures
- Operations and Maintenance Manual

Prior to project turnover the Commissioning Package includes:

- Final Commissioning Report, including drawings, specifications and relevant supporting documentation
- Final copies of the Commissioning Schedule and Commissioning Deliverables List
- Documents related to testing, performance verification and certification, witnessing, acceptance, and report on results
- Commissioning Issues and Resolution Log
- Confirmation of training completed
- Standard Operating Procedures and Report on Standard Operating Procedures

<ul style="list-style-type: none"> <li>• Commissioning Manual and Report on the Commissioning Manual</li> <li>• Report on the Operations and Maintenance Manual</li> <li>• Building Management Manual and Report on the review and acceptance of Building Management Manual</li> <li>• Result of the reviews on the Preventative Maintenance Support System (PMSS/IMS) documentation</li> </ul>
<b><u>Submission Purpose:</u></b> For Review
<b><u>Frequency and Timing:</u></b>  Each Commissioning Package is submitted only once according to the timing given in Preparation Instructions above.
<b><u>Internal Review Period:</u></b> 40 calendar days.

<b>DID RP3.1-PD-40: Risk Management Plan</b>
<b><u>SOW Reference:</u></b> Risk Management
<b><u>Purpose:</u></b> To ensure that project risks are clearly identified and assessed, control strategies are applied, allowances calculated, and risks monitored throughout the life of the project.
<b><u>Related Documents:</u></b> <ul style="list-style-type: none"> <li>• DID RP3.1-PD-01 – Project Management Plan</li> <li>• DID RP3.1-PD-02 – Project Status Report</li> </ul>
<b><u>Preparation Instruction:</u></b>  Refer to PSPC website: <a href="https://www.tpsgc-pwgsc.gc.ca/biens-property/sngp-npms/bi-rp/conn-know/risque-risk/index-eng.html">https://www.tpsgc-pwgsc.gc.ca/biens-property/sngp-npms/bi-rp/conn-know/risque-risk/index-eng.html</a>  Refer to PSPC NCOE Risk Management Guide

Using the PSPC Risk Management NCOE - NPMS Risk Management Plan (RMP) template complete the required tabs and submit to the Technical Authority.

**Submission Purpose:** For Review.

**Frequency/Timing:** Within 30 days after contract award; resubmit when any major changes in scope, schedule, costs or other risks arise; resubmit at the transition point between the design and construction phases; and at the end of the project for record purposes.

**Internal Review Period:** 7 calendar days.

#### **DID RP3.1-PD-41: Lessons Learned Log**

**SOW Reference:** Scope of Services for Project Management

**Purpose:** A lesson learned is defined as knowledge gained from experience, successful or otherwise, for the purpose of improving future performance. The Contractor will provide lessons learned to PWGSC for its use in improving project delivery processes and practices.

**Related Documents:**

Directive on the Management of Projects and Programmes

<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32594>

**Preparation Instruction:**

Complete the PWGSC Lessons Learned Log Template supplied with the RFP. Where the Contractor is unsure of the required content in any of the fields, contact the Technical Authority.

**Submission Purpose:** For Information

**Frequency/Timing:** Submit new lessons learned within 15 business days after the completion of each project phase and complete and submit a comprehensive log of all lessons learned at the end of the project for record purposes.

**Internal Review Period:** Not applicable.

#### **DID RP3.1-PD-42: Exemption to Accessibility Requirements**

<b><u>SOW Reference:</u></b> Accessibility
<b><u>Purpose:</u></b> To request the approval of a full or partial exemption to the accessibility requirements of the Treasury Board Accessibility Standard for Real Property including the technical standard “Accessible Design for the Built Environment” CSA-B651-18.
<b><u>Related Documents:</u></b> <ul style="list-style-type: none"> <li>• Treasury Board Accessibility Standard for Real Property</li> <li>• CSA-B651-18 - Accessible Design for the Built Environment</li> <li>• RPS Accessibility Procedures</li> </ul>
<b><u>Preparation Instructions:</u></b> <ul style="list-style-type: none"> <li>• Prepare the Request for Approval Exemption to Accessibility Requirements that is consistent with the requirements and related obligations stated in the above Related Documents.</li> <li>• The request for approval must be prepared in consultation with the technical expert, and must include: <ul style="list-style-type: none"> <li>○ description of the exemption</li> <li>○ analysis of options considered</li> <li>○ justification for the recommendation</li> <li>○ risks and mitigation strategies</li> <li>○ copy of the accessibility evaluation</li> </ul> </li> <li>• Any impact the exemption may have on a tenant department must be explained and an indication of that department’s concurrence with the recommendation provided.</li> <li>• Justifications and decisions for all exemptions and minor variations must be well documented and retained on the project or building file. A suggested file record form is provided below.</li> </ul>
<b><u>Submission Purpose:</u></b> Acceptance. Acceptance of the Request for Approval Exemption to Accessibility Requirements is required before proceeding with any work that would not meet accessibility requirements.
<b><u>Frequency/Timing:</u></b> Once, in conjunction with the 66% Schematic Design submission; thereafter whenever there is change in project scope that would require exemptions to accessibility requirements.
<b><u>Internal Review Period:</u></b> 18 calendar days, in conjunction with review of phase-specific design development packages.

## Request for Approval Exemption to Accessibility Requirements

**Request for Approval  
Exemption to Accessibility Requirements**

**Purpose:** To request the approval of a *[full or partial]* exemption to the accessibility requirements of the Treasury Board *Accessibility Standard for Real Property* including the technical standard "Accessible Design for the Built Environment" CAN/CSA-B651-18.

**Project Title/Description:** *[include type of project e.g. acquisition, construction, major renovation, fit-up]*

**Project Number:**

**Building Name and Address:**

**Asset Type:** *[i.e. Crown-owned, lease, lease-purchase]*

**Client Department(s):**

**Description of Exemption(s):**

**Summary of Accessibility Evaluation:** *[who conducted the inspection, date of report, and summary findings including modifications required to meet accessibility requirements; attach copy of report]*

**Options:** *[provide an analysis of options considered including costs, benefits and risks]*

**Recommendation:** *[state the recommended option and provide the justification including mitigation strategies for any risks]*

By allowing this *[indicate full / partial]* exemption, no significant barrier-free access to, use of and egress from the real property would be experienced by the client and/or the general public.

**Recommended by:**

Sponsor:

[name]

[title]

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

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

Technical Expert:

[name]

[title]

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

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

Chairperson, Advisory Committee:

[name]

[title]

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

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

**Approved by:**

[name]

Regional Director General

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

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

**File Record Form**  
**Exemptions and Minor Variations**  
**Treasury Board Accessibility Standard for Real Property**

Project No.:  
 Building Name and Address:  
 Project Leader:  
 Project Manager:  
 Date:

Full Exemption (yes/no)	Partial Exemption (yes/no)	Minor Variation (yes/no)
Accessibility Element:		
Estimated Cost of Meeting TB <i>Accessibility Standard for Real Property</i> : \$		
Issues/Comments:		
Technical Expert: Name: Title: Date of Inspection: Recommendation:		
<i>NB: Copy of technical report must be included in file</i>		
RDG Approval Received: (yes/no/not applicable)		
Name:		
Date:		
<i>NB: Copy of signed approval request form must be included in file</i>		
Full Exemption (yes/no)	Partial Exemption (yes/no)	Minor Variation (yes/no)
Accessibility Element:		
Estimated Cost of Meeting TB <i>Accessibility Standard for Real Property</i> : \$		
Issues/Comments:		
Technical Expert: Name: Title: Date of Inspection: Recommendation:		
<i>NB: Copy of technical report must be included in file</i>		
RDG Approval Received: (yes/no/not applicable)		

Name: Date:  <i>NB: Copy of signed approval request form must be included in file</i>		
Full Exemption (yes/no)	Partial Exemption (yes/no)	Minor Variation (yes/no)
Accessibility Element:  		
Estimated Cost of Meeting TB Accessibility Standard for Real Property: \$		
Issues/Comments:  		
Technical Expert: Name: Title: Date of Inspection: Recommendation:  <i>NB: Copy of technical report must be included in file</i>		
RDG Approval Received: (yes/no/not applicable) Name: Date:  <i>NB: Copy of signed approval request form must be included in file</i>		

<b>DID RP3.1-PD-43: Checkpoints/Dates for the On-Time Key Performance Indicator (KPI)</b>
<b><u>SOW Reference:</u></b> Performance Measurement Regime
<b><u>Purpose:</u></b> To capture the checkpoints to be measured and checkpoint “completed-by” dates as agreed to by both the Contractor and the Technical Authority.
<b><u>Related Documents:</u></b> Deliverable <i>Amendment to the Checkpoints/Dates for the On-Time KPI</i> (DID RP3.1-PD-44).
<p><b><u>Preparation Instructions:</u></b></p> <p>Meet with the TA at the beginning of the project to discuss and agree to the checkpoints to be measured and their associated checkpoint “completed-by” dates for purposes of the Performance Measurement Regime’s <i>Achieve On-Time Performance of the Project</i> KPI. The results of the agreement are to be recorded in this deliverable.</p> <p>The Contractor may record the information identified herein in a format of their choosing.</p> <p>State the agreed upon checkpoints and their respective “completed by” dates, including a final completion date.</p> <p>The checkpoints must include the following at a minimum:</p> <ul style="list-style-type: none"> <li>– 66% Design Development Package deliverable submitted and verified as “Reviewed” by the TA; the “completed by” date needs to account for the eighteen calendar days for PWGSC to complete their review of the deliverable RP3.1-PD-09</li> <li>– 99% Final Design Package deliverable submitted and verified as “Reviewed” by the TA; the “completed by” date will need to account for the eighteen calendar days for PWGSC to complete their review of the deliverable RP3.1-PD-09</li> <li>– construction tenders (for subcontractors) issued by the Contractor</li> <li>– certificate of substantial completion</li> <li>– application for permits/permits received</li> </ul> <p>In addition to the above checkpoints, the TA may establish additional checkpoints.</p> <p>For each checkpoint clearly describe what constitutes its completion; this should be tangible and something both the TA and the Contractor can verify independently.</p> <p>At any point during the project the Contractor may propose, for the TA’s consideration and approval, an extension to a “completed-by” date associated with a checkpoint. Any request to amend checkpoint “completed-by” dates should be made through deliverable DID RP3.1-PD-44: <i>Amendment to the Checkpoints/Dates for the On-Time KPI</i>.</p> <p>State who prepared the information contained in the deliverable submission and who is approving it for the Contractor. Minimally the Contractor’s Project Manager should be a signatory. The TA’s acceptance of the deliverable will constitute PSWSG’s agreement.</p>
<b><u>Submission Purpose:</u></b> For Acceptance.
<b><u>Frequency/Timing:</u></b> Once, within thirty days of Contractor award.

**Internal Review Period:** Fourteen calendar days.

**DID RP3.1-PD-44: Amendment to the Checkpoints/Dates for the On-Time Key Performance Indicator (KPI)**

**SOW Reference:** Performance Measurement Regime

**Purpose:** At any point during the project the Contractor may propose, for the TA's consideration and approval, an extension/alteration to a "completed-by" date associated with one or more checkpoints. This deliverable serves to document and request an extension/alteration to a "completed-by" date for one or more checkpoints.

**Related Documents:** Deliverable *Checkpoints/Dates for the On-Time KPI* (DID RP3.1-PD-43).

**Preparation Instructions:**

The Contractor may record the information identified herein in a format of their choosing.

Provide the following information:

- for the checkpoint(s) proposed to be amended, state the original "completed-by" date and the proposed new "completed-by" date;
- any impacts to the other checkpoints and their respective "completed-by" dates;
- what led to, or will lead to, the proposed amendment(s);
- how is what led to, or will lead to, the proposed amendment out of the control of the Contractor and therefore not their accountability;
- what has the Contractor done, or what will the Contractor do, to:
  - minimize the extension to the "completed-by" date;
  - mitigate the impacts to the project.

State who prepared the information contained in the deliverable submission and who is approving it for the Contractor. Minimally the Contractor's Project Manager should be a signatory. The TA's acceptance of the deliverable will constitute PWGSC's agreement.

**Submission Purpose:** For Acceptance.

**Frequency/Timing:** As and when required.

**Internal Review Period:** Fourteen calendar days.

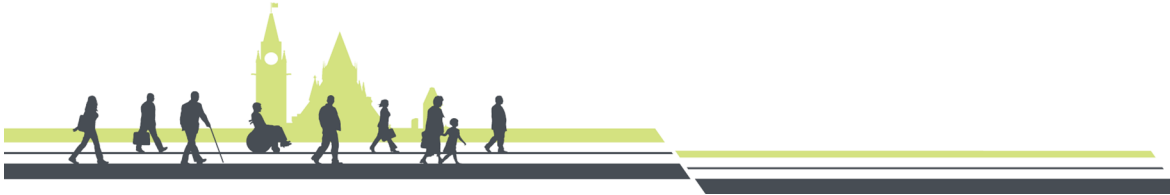
## Appendix 2 – Performance Measurement Manual



Public Services and  
Procurement Canada

Services publics et  
Approvisionnement Canada

Canada



Serving  
GOVERNMENT,  
serving  
CANADIANS.

## **Annex A Appendix 2**

### **Performance Management Manual**

# **PROJECT SERVICES FOR OFFICE FIT-UPS AND LIGHT BASE BUILDING WORK**







## **Performance Management**

### **Background**

PWGSC is committed to performance management. This Supply Arrangement (SA) has performance priorities to incent all projects to be delivered on-time and efficiently minimizing Canada's effort in administering projects, as well as to incorporate Indigenous participation within specific projects. In order to achieve the performance priorities named herein, a Performance Management Framework has been established composed of two important elements: performance management; and performance measurement.

While performance measurement is about tracking the progress of the contract Key Performance Indicators (KPI), performance management is about managing the delivery of the Work against not only the KPI's identified herein but against all the services of the Statement of Work. The onus is on the Contractor to do both performance measurement and management and thus obtain effective performance results. This includes their self-monitoring of progress and appropriately self-correcting, such as through their quality management processes, in order to improve the performance if the results are below those targeted in this Performance Management Manual, or as stated in the contractual documents supporting Contract Performance Management including the Statement of Work. Therefore, the Contractor's performance management regime in carrying out all Work ensures that all of PWGSC's service delivery requirements are performed as required and that performance deficiencies are addressed through a continual improvement process to prevent their recurrence. For the most part, oversight of performance measurement is undertaken and managed by PWGSC. This stated, the Contractor is expected to be monitoring its own performance progress and results.

The Contractor is expected to ensure that information that may be required by PWGSC to support performance monitoring is available to the Technical Authority (TA) without delay. Notwithstanding the specific KPI's embedded in the Performance Management Framework, PWGSC may, from time to time, ask the Contractor for other performance information to support its contract performance oversight.

### **Performance Measurement Framework (PMF) and Award of the Performance Incentive**

As depicted on the diagram below, the PMF serves to award the Contractor an incentive for achievement of the specific KPI's in the delivery of a project. The total incentive available is distributed among the KPI's with the Contractor receiving up to the maximum incentive

allocated to each respective KPI, or a portion of the incentive, based on their results achieved against that indicator.

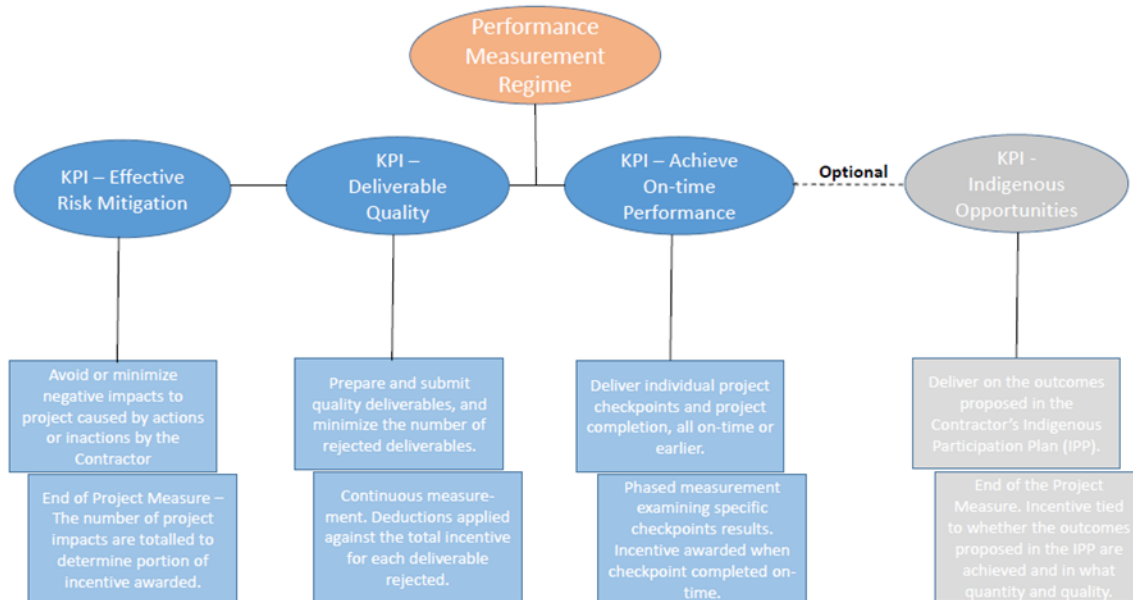
More specifically, the PMF consists of four Key Performance Indicators, these being Effective Risk Mitigation, Deliverable Quality, Achieve On-Time Performance of the Project, and Indigenous Opportunities.

It is important to note that the Indigenous Opportunities KPI will be applied at PWGSC's discretion on a project by project basis. This is explained in more detail under the heading KPI - Indigenous Opportunities.

The methodology for measurement of each KPI is generally explained below. More specific details on KPI measurement will be provided at the Request for Proposal (RFP) stage of the SA.

While the KPI's and the application of the PMF is pre-established at the Request for Supply Arrangement (RFSA) stage and will remain as such for purposes of each project-specific RFP, both the maximum available performance incentive and the distribution of the incentive to the KPI's are project-specific and will be established and stated in the RFP. The entire performance incentive is therefore divided among the three or four KPI's, depending on whether Indigenous Opportunities is applicable to the specific project.

## Performance Measurement Framework



On a quarterly basis the TA will report in writing to the Contractor the Performance Measurement Regime's cumulative performance progress. Further, the two parties will meet quarterly to review performance progress and the interim incentive results. During this review the parties will discuss performance issues and problems, and actions being taken or planned to be taken to resolve these. Also the two parties should identify continual improvement opportunities to help the Contractor's performance achieve or even surpass the individual KPI's objectives.

While Contractor performance is monitored by Canada throughout the year and discussed with the Contractor on a quarterly basis, the evaluation of the Contractor's annual performance takes place every twelve months from the date of issuance of the Contract (i.e. sometime within the thirteen month). Like the quarterly review, the Contractor meets with the TA annually to review the results for the prior year and identify opportunities to help the Contractor's performance achieve or surpass the individual KPI's objectives. The evaluation of the Contractor's final performance is completed within sixty days of project substantial completion.

Finally, the Contractor is expected to work collaboratively with the TA to resolve disagreement regarding the accuracy of the performance measurement information including the final results.

## **Performance Measurement Services**

The Contractor must manage its performance against the Performance Management Framework and leverage its internal performance management regime and quality management processes, at its own cost, in order to contribute to the performance priorities of the Contract.

The Contractor must effectively integrate and apply performance management into its Work and provision of the services set out in the Statement of Work (SOW).

The Contractor must collaborate with and support the TA, and other parties, engaged in monitoring of the performance of the Work performed by the Contractor. The Contractor must maintain information in good order, ensure that it is available and kept in a state of assessment readiness, and must provide access to it when asked for by the TA.

## **KPI – EFFECTIVE RISK MITIGATION**

Background: PWGSC desires that the Contractor deliver projects efficiently, ensuring PWGSC is only involved where expected for purposes of administering the contract, and, if needing to be involved extraordinarily, that PWGSC's level of effort is minimized. Further, efficient delivery expects that the Contractor's work conforms to acceptable practices, adheres to legislation, and that the requirements and terms of the contract are met. Through its Effective Risk Mitigation KPI PWGSC will account for Contractor's Work that doesn't conform to the efficient delivery requirements where this has resulted from action or inactions on the part of the Contractor.

Measurement Statement: Deliver a successful project by preventing or minimizing risks that have negative impacts to project.

Each negative impact is subject to measurement under this KPI. The premise is as follows. The need for PWGSC to monitor, report and respond to a negative impact is undesirable as it (a) takes additional effort on PWGSC's part and (b) it may have delivery and outcome impacts to the project, such as a schedule delay. By applying this KPI the Contractor is incented to master negative impacts.

Measurement Details:

“Negative impacts” to the project means:

- injury or harm to a person; harm to property, and the environment; a material loss including to areas adjacent to the Work site
- results in costs to the Crown outside of the project scope
- harm to the reputation of the department or to the Crown
- contravention of regulatory compliance, department policy or standards (see SOW, Annex A Appendix 3)
- a profound effect on the quality of the services provided or on the project results
- interruption to the operation of the building, the operations of tenant organizations, and/or to the delivery of government services to the public
- requiring the extraordinary involvement of the TA, the Building Control Authority or other project stakeholders, to mitigate, rectify, resolve or report the impacting event
- not reporting a negative impact to PWGSC

Negative impacts must have resulted from one or more of the following actions or inactions on the part of the Contractor:

- a failure to use reasonable care in conducting the work including the failure to follow standard practices for the Work and circumstances
- an issue that is not rectified within a reasonable period of time that thereafter results in another chronic, pervasive or systemic issue(s) which is a long-lasting, or reoccurring
- a failure to fulfill or meet a requirement or term of the contract as soon as reasonably practicable

The action or inaction of the Contractor and any associated resulting negative impacts are collectively known as the “impacting events”.

All impacting events will be supported by evidence by PWGSC in order to be measureable. Instances of impacting events will be documented by the TA. The TA will promptly report impacting events to the Contractor so that the Contractor may immediately work towards mitigating, rectifying and/or resolving the impacting event, and for purposes of continual

improvement. To raise an impacting event the TA will document in writing the impacting event. The documentation will describe the negative impact, the circumstances leading up to the impacting event, the actions or inactions on the part of the Contractor that resulted in the negative impact, and efforts made to mitigate, rectify, resolve or report the impacting event including the specific efforts of the Contractor. All impacting events raised will be subject to an internal PWGSC governance review and acceptance process.

As per the SOW, in particular 4.3 Quality Management, the Contractor must cooperate with the TA's investigation and documentation of an impacting event including providing promptly any documentation requested by the TA.

For context, examples of potential impacting events are not limited to:

Failure to respect the time and space allocated for the project leading to injury or harm, and including contravening of Ontario's Occupational Health and Safety Act and Regulations for Construction Projects or Quebec's Act Respecting Occupational Health and Safety, and including warning letters issued by the authorities having jurisdiction implicating Canada, PWGSC, its employees and representatives, or the Building Control Authority.

An interruption to the operations of tenant organizations such as an evacuation caused by a fire alarm, releases of odours, or deleterious substance (e.g. asbestos), or a temporary shutdown due to unavailability of building services.

Delays in the delivery of the project that results in a lease hold-over and/or lease hold-over costs.

The scoring application of impacting events works as follows. For each project, a maximum permissible number of impacting events is assigned and associated scoring allocated with the scoring indicating the portion of the available incentive to be awarded at project completion. The scoring varies depending on PWGSC's estimated duration of the project. If over the duration of the project no impacting events are raised, the maximum score available is awarded at project completion. On the other hand, as impacting events occur, the scoring is adjusted down according to scoring ranges including to a score of zero if the maximum permissible number of impacting events is exceeded. The score is a percentage of the total available incentive for the Effective Risk Mitigation KPI. Therefore, where there are no impacting events, the Contractor's score would be 100% and would result in the full value of the incentive, as indicated in the Project Brief (Annex E Appendix 1), being awarded to the Contractor.

Concerning not reporting a negative impact to PWGSC, where the negative impact not reported results in an impacting event, another impacting event would be raised by the TA for failure to report, therefore resulting in two impacting events.

The assignment of scoring will be decided on a project specific basis and thus identified in the respective RFP's. Below is a hypothetical scoring regime that could be applied; it is provided for reference:

<b><i>Estimated Project Duration</i></b>	<b><i>Number of Cumulated Impacting Events/Associated Scoring</i></b>					
<i>Less than two years</i>	<i>0/100%</i>	<i>1/75%</i>	<i>2/50%</i>	<i>3 or more /0%</i>		
<i>Two to three years</i>	<i>0/100%</i>	<i>1/75%</i>	<i>2/50%</i>	<i>3/25%</i>	<i>4 or more/0%</i>	
<i>More than three years</i>	<i>0/100%</i>	<i>1/75%</i>	<i>2/50%</i>	<i>3/35%</i>	<i>4/20%</i>	<i>5 or more/0%</i>

*The score is a percentage of the total available incentive for the Effective Risk Mitigation KPI. At the end of the project, based on the number of cumulated impacting events having occurred over the full duration of the project, the percentage scoring is selected from the above table. The total incentive available for this KPI is multiplied by the percentage score to arrive at the total incentive paid. Therefore, where there are no impacting events, the Contractor's score would be 100% and would result in the full value of the incentive being paid to the Contractor.*

## **KPI - ACHIEVE ON-TIME PERFORMANCE OF THE PROJECT**

Background: PWGSC desires fast delivery. This is primarily achieved through the design of the SA itself, more specifically via integration of multiple services into the SA and access to prequalified vendors via the SA. To support the fast delivery objective of the tool, each project will establish and measure several achievable checkpoint-based “completed by” dates/timelines, including a final completion checkpoint.

Measurement Statement: Deliver individual project deliverables (i.e. checkpoints) and complete the project on-time or earlier.

Measurement Details:

Each project will establish and measure several achievable checkpoint-based “completed by” dates, including a final project completion date. Notwithstanding that certain checkpoints to be included for measurement are pre-established in the RFP (see “mandatory checkpoints” below), these checkpoints and completed by dates are to be jointly agreed to between the TA and the Contractor at the beginning of the project.

“On time” mean by a specific pre-established “completed by” date.

“Checkpoint” means completion of a specific, measurable portion of the work such as specific work, activities, and/or project milestones. For example, one or more of the SOW's

deliverables may be used; PWGSC's review completed for a "for review" deliverable or PWGSC's acceptance for a "for acceptance" deliverable would constitute checkpoint completion. Alternately, any work that PWGSC can easily verify through inspection could be used as a checkpoint including physical construction work.

If the checkpoints are correctly established at the outset of the project and the Contractor diligently performs the work, and faces no major unforeseen circumstances or major events, the Contractor should be able to achieve all checkpoints by the "completed by" date. The intention of establishing and regularly measuring Contractor work progress is ensuring the project progresses as planned and is therefore completed on time.

Each checkpoint is subject to measurement under this KPI. The premise is as follows. The need for PWGSC to manage internal consequence from changes to the project schedule is undesirable as it (a) takes additional effort on PWGSC's part and (b) it may have delivery and outcome impacts to the project, such as a schedule delay. By applying this KPI the Contractor is incented to manage the performance of its project schedule.

The checkpoints to be measured for each project will include the following at a minimum (i.e. the "mandatory checkpoints"):

- 66% Design Development Package submitted and verified as "Reviewed" by the TA (the "completed by" will need to account for the eighteen calendar days for PWGSC to complete their review)
- 99% Final Design Package submitted and verified as "Reviewed" by the TA (the "completed by" will need to account for the eighteen calendar days for PWGSC to complete their review)
- construction tenders issued by the Contractor
- certificate of substantial completion
- application for permits/permits received

Additional checkpoints may be established for each project at the discretion of the TA (see below "additional checkpoint(s)"); these can be determined and stated in the RFP or can be reserved to be identified after contract award. Where the RFP reserves additional checkpoints to be established after contract award, these checkpoints could be proposed by the Contractor.

Checkpoints need to be readily substantiated as complete by both parties, with each checkpoint clearly describing what constitutes its completion. This should be tangible and something both the TA and the Contractor can verify independently. For example for 66% Design Development Package submitted and verified as "Reviewed" by the TA, PWGSC tracks the review status of deliverables through Real Property Document Exchange and the Real Property Portal. These systems will flag the date which PWGSC has completed and verified the deliverable as "Reviewed".

The distribution of the total available incentive for the Achieve On-time Performance of the Project KPI to the individual checkpoints will be decided on a project specific basis and thus identified in the respective RFP's. The total weighting of all checkpoints equals 100 (as in

100%). A specific weighting for each of the mandatory checkpoints will be given in the RFP. For the additional checkpoint(s), the total specific weighting to be shared equally between these checkpoints will also be given in the RFP.

If no agreement is reached between the parties, then the entire KPI for on-time performance of the project will not be available for that specific project.

The following is a hypothetical scoring regime for this KPI. At the RFP, starting with a total weighting of 100%, the weightings for the respective mandatory checkpoints are: the certificate of substantial completion checkpoint is weighted as 50%; the remaining four mandatory checkpoints are weighted as 10% each. The balance of the total weighting remaining, this being 10%, is allocated to the additional checkpoints and shared equally between the additional checkpoints (i.e. if only one additional checkpoint it is weighted as 10%; if two additional checkpoints they are each weighted 5% each; if three additional checkpoints they are weighted 3.33% each).

In the case where the Contractor proposes that a project be delivered in phases, which will not be known until after contract award, the same checkpoints will be used except that the appropriate checkpoints may be divided into two or more sub-checkpoints. For example, if the Contractor proposes to deliver the project in two phases, including for both design and construction, the 66% Design Development Package would be divided into two 66% Design Development Packages, with each having its own completed by date. Similarly, the certificate of substantial completion checkpoint would need to be appropriately divided into two sub-checkpoints with individual completed by dates. Further, the weighting established originally for the checkpoints would remain the same, except it would be divided equally among the sub-checkpoints.

Scoring of the completed (or not) individual checkpoints functions as following. Each individual checkpoint is awarded its full weighted score of 100% if it is finished before or by the “completed by” date and therefore the full incentive allocated to this checkpoint is awarded. If the checkpoint is completed after the established “completed-by” date, it is late and is awarded a score of zero and no incentive is awarded. For added clarity, should all of the checkpoints be completed on time or earlier the Contractor would be awarded 100% of the total incentive available for this KPI.

This KPI will be supported by two Contractor prepared deliverables. The first deliverable will capture the checkpoints to be measured and checkpoint “completed-by” dates as agreed to by both the Contractor and the TA. This is the deliverable Checkpoints/Dates for the On-Time Performance KPI (DID RP3.1-PD-43).

The second deliverable will be used by the Contractor to document and request an extension/alteration to a “completed-by” date for a checkpoint. This is the deliverable Amendment to the Checkpoints/Dates for the On-Time KPI (DID RP3.1-PD-44). At any point during the project the Contractor may propose for the TA’s consideration and approval

(or refusal) an extension/alteration to a “completed-by” date associated with a checkpoint through the deliverable which requires the following information to be provided:

- what is the proposed extension/alteration to the individual checkpoint “completed-by” date?
- are there any impacts to the other checkpoints?
- what led or will led to the proposed extension/alteration?
- how is the proposed need to seek an extension/alteration out of the control of the Contractor and therefore not their accountability (e.g. delays accountable to PWGSC such as review of the deliverable, unforeseen site conditions and related change orders, restrictions on accessing the site, or working hours)?
- what has the Contractor done, or what will the Contractor do to minimize the requested extension/alteration; to mitigate the impacts; etc.?

The onus is on the Contractor to manage its project schedule and to keep it on time even if circumstances may influence the schedule. The Contractor should not contemplate requesting an extension/alteration to a checkpoint “completed-by” date previously agreed to by the TA and the Contractor every time circumstances change.

#### KPI – DELIVERABLE QUALITY

Background: PWGSC desires that the Contractor efficiently deliver projects, ensuring that interaction with PWGSC, in this case with respect to deliverable submission and review, is as expected for purposes of administering the contract, and more specifically minimizes PWGSC’s level of effort. Implicitly, deliverables should be submitted when expected, and to the desired standard (re. see SOW 4.11 Data and Information Management, and Deliverables, and individual Deliverable Item Descriptions), and the need for resubmissions and level of effort for revisions should be minimized. Through its Performance Measurement Framework and this KPI PWGSC will account for Contractor’s Work that doesn’t conform to these requirements.

Measurement Statement: Prepare and submit quality deliverables.

Measurement Details:

For each project, the required deliverables will be found via the SOW, the DID Standard, and the RFP/Project Brief. Most deliverables are submitted to PWGSC for either acceptance or for review. Formally these deliverables are known as “For Review Deliverables” and “For Acceptance Deliverables”. In both cases, PWGSC does a technical review of the deliverable in order to determine whether the deliverable is of appropriate quality to be marked as “reviewed” or as “accepted”. PWGSC’s review of deliverables is guided by deliverable-specific Oversight Work Instructions (OWI). Deliverables which are either reviewed or accepted do not need to be corrected and resubmitted by the Contractor. On the other hand, deliverables which are rejected need to be revised and then resubmitted and thereafter are subject to another technical review by PWGSC. This revision/resubmission/review process

occurs for as many times as is necessary for the deliverable to meet the reviewed and/or accepted standard established in the OWI.

Each “for review” and “for acceptance” deliverable is subject to measurement under this KPI. The premise is as follows. The need for PWGSC to review a deliverable more than once is undesirable as it (a) takes additional effort on PWGSC’s part and (b) it may have delivery and outcome impacts to the project, such as a schedule delay. By applying the deliverable quality KPI the Contractor is incented to minimize the number of rejected deliverables.

With the above in mind, a pre-established amount of the total incentive available for this KPI is deducted for each deliverable rejected (i.e. “quality deduction”). The amount of the quality deduction is deliverable specific and is considerate of the deliverable’s impact on the delivery and outcomes of the project; the more the impact the more the deduction. Further, each deliverable permits one or more rejections before the deduction is applied. This is intended to account for the complexity of these deliverables and the probability that they will not meet the OWI requirements via the initial submission(s). The deliverables that have a higher probability of being rejected are permitted more rejections before the quality deduction starts being applied.

The application of the quality deduction is simple. For each deliverable type, once its respective number of permitted reductions is exceeded, for each subsequent reduction the total incentive available is reduced by the amount of the assigned quality deduction. This is cumulative for the deliverable no matter how many unique times that deliverable is submitted. For example, the Project Status Report (PSR) deliverable is submitted each month. Thus there is a unique PSR submission every month. The PSR is permitted up to three rejections before the quality deduction applies. Whether the three rejections are accumulated in the first PSR submitted after Contractor award, or in the first ten PSR submitted, at the next occurrence of a rejection (i.e. the fourth rejection) the quality deduction amount for the PSR is applied, and for every rejection thereafter. At an aggregate level, the individual quality deductions accumulate against the total incentive available. The amount of incentive awarded at the end of the project is the amount of the incentive remaining after all the deductions are applied.

As stated previously, both the available performance incentive and the distribution of the incentive to the KPI’s are project-specific and will be established and stated in the RFP. Further, as the specific deliverables required is project specific, and as the number of individual deliverable submissions is influenced by project phasing and duration and is therefore also project specific, the number of permitted rejections and the quality reduction amount for each deliverable will be determined and provided to the Contractor via an incentive schedule within sixty days of Contract award (i.e. after the Contractor’s Project Management Plan has been accepted at which time the project phasing and duration has been determined).

Below are three hypothetical scoring scenarios provided for reference:

20M\$ project

Deliverable Title	Number of rejection tolerance for the duration of the project	Number of submissions per project. (Number of submission may vary from one project to another)	Deduction per Occurrence
DID RP3.1-PD-01: Project Management Plan (PMP)	2	3	247,25 \$
DID RP3.1-PD-02: Project Status Report	3	28	412,09 \$
DID RP3.1-PD-03: Project Meeting Minutes	2	28	82,42 \$
DID RP3.1-PD-04: Construction Cost Estimates	2	3	1 236,26 \$
DID RP3.1-PD-09: Design Development Packages	2	2	6 181,32 \$
DID RP3.1-PD-10: Preliminary Furniture Recommendations Report	1	1	741,76 \$
DID RP3.1-PD-11: Furniture Proposal Package	2	1	741,76 \$
DID RP3.1-PD-13: CAD As-Built Drawings	1	1	741,76 \$
DID RP3.1-PD-14: CAD Occupancy Floor Plans	1	2	412,09 \$
DID RP3.1-PD-19: Conservation Approach Brief (CAB)	2	4	164,84 \$
DID RP3.1-PD-20: Movable Heritage Protection Measures Plan	2	2	412,09 \$
DID RP3.1-PD-21: Heritage Conformity Form	2	4	164,84 \$
DID RP3.1-PD-22: Project Sustainability Strategy (includes Project Sustainability Planning and Tracking Tool)	2	3	1 236,26 \$
DID RP3.1-PD-24: Evaluate Project GHG Emissions	2	1	3 708,79 \$
DID RP3.1-PD-25: Construction, Renovation and Demolition (CRD) Waste Management Plan	1	2	412,09 \$
DID RP3.1-PD-30: Legionella System Risk and Hazard Assessment Form	1	2	412,09 \$
DID RP3.1-PD-32: Indigenous Benefits Plan Report	2	1	3 708,79 \$
DID RP3.1-PD-34: Commissioning	3	4	2 472,53 \$
DID RP3.1-PD-40: Risk management Plan	2	1	741,76 \$
DID RP3.1-PD-42: Exemption to Accessibility Requirements	1	1	741,76 \$

## 75M\$ Project

Deliverable Title	Number of rejection tolerance for the duration of the project	Number of submissions per project. (Number of submission may vary from one project to another)	Deduction per Occurrence
DID RP3.1-PD-01: Project Management Plan (PMP)	2	3	927,20 \$
DID RP3.1-PD-02: Project Status Report	3	28	1 545,33 \$
DID RP3.1-PD-03: Project Meeting Minutes	2	28	309,07 \$
DID RP3.1-PD-04: Construction Cost Estimates	2	3	4 635,99 \$
DID RP3.1-PD-09: Design Development Packages	2	2	23 179,95 \$
DID RP3.1-PD-10: Preliminary Furniture Recommendations Report	1	1	2 781,59 \$
DID RP3.1-PD-11: Furniture Proposal Package	2	1	2 781,59 \$
DID RP3.1-PD-13: CAD As-Built Drawings	1	1	2 781,59 \$
DID RP3.1-PD-14: CAD Occupancy Floor Plans	1	2	1 545,33 \$
DID RP3.1-PD-19: Conservation Approach Brief (CAB)	2	4	618,13 \$
DID RP3.1-PD-20: Movable Heritage Protection Measures Plan	2	2	1 545,33 \$
DID RP3.1-PD-21: Heritage Conformity Form	2	4	618,13 \$
DID RP3.1-PD-22: Project Sustainability Strategy (includes Project Sustainability Planning and Tracking Tool)	2	3	4 635,99 \$
DID RP3.1-PD-24: Evaluate Project GHG Emissions	2	1	13 907,97 \$
DID RP3.1-PD-25: Construction, Renovation and Demolition (CRD) Waste Management Plan	1	2	1 545,33 \$
DID RP3.1-PD-30: Legionella System Risk and Hazard Assessment Form	1	2	1 545,33 \$
DID RP3.1-PD-32: Indigenous Benefits Plan Report	2	1	13 907,97 \$
DID RP3.1-PD-34: Commissioning	3	4	9 271,98 \$
DID RP3.1-PD-40: Risk management Plan	2	1	2 781,59 \$
DID RP3.1-PD-42: Exemption to Accessibility Requirements	1	1	2 781,59 \$

## **KPI – INDIGENOUS OPPORTUNITIES**

This is an optional KPI whose applicability will be reflected in the individual projects' RFP's, depending on the need as determined by the TA.

Where the measure is applicable, The RFP will indicate the maximum incentive available. The incentive awarded is up to the maximum available but prorated against the quality of the project specific Indigenous Participation Plan, and reflecting whether the projected outcomes of this plan are ultimately achieved and in what quantity and quality.

The maximum incentive is intended to be awarded when (a) the project specific Indigenous Participation Plan proposed superior outcomes and (b) those outcomes are fully achieved. As project specific Indigenous Participation plans are only available after the RFP closes, the quality of the plan can only be assessed after bids are received the winning bidder is determined. It is for this reason that the maximum amount of incentive may be adjusted down to reflect an Indigenous Participation Plan that does not propose superior outcomes and rather offers something less. With respect to performance measurement, the outcomes achieved (i.e. the final results) will be considered in awarding the incentive. As stated previously, where outcomes have been fully realised, the maximum incentive will be awarded. On the other hand, lesser outcomes will result in an appropriate reduction in the incentive awarded.

## Appendix 3 – Non-Exhaustive list of Acts, Regulations, Standards and other references

### General

[Treasury Board Policy on Management of Real Property](#)

[Guide to the Management of Real Property](#)

[Treasury Board Reporting Standard on Real Property](#)

[Federal Real Property and Federal Immovables Regulations](#)

[Treasury Board Policy on the Planning and Management of Investments](#)

PSPC Area Measurement Policy

PSPC Area Measurement Standard

Real Property Branch - Good Neighbour Policy

### Project Delivery Services

[National Capital Act](#)

[Directive on the Management of Projects and Programmes](#)

[National Project Management System](#) (will be replaced by PSPC Project Navigator)

PSPC Project Navigator (will replace National Project Management System)

Real Property Project Funding and Cost Planning Workbook

### Health and Safety

[Canada Labour Code Part II](#)

[NJC Occupational Health and Safety Directive](#)

PSPC Policy on Occupational Health and Safety

Directive on Occupational Health and Safety—Hazard Prevention Program

Standard on Electrical Safety

Standard on Working Alone

Standard on Entry Into Confined

Standard on First Aid

Standard on Hazardous Substances

Standard on Occupational Health Evaluation

Standard on Hazardous Occurrence Investigations and Reporting

Directive on Construction Occupational Health and Safety

Standard On Construction Occupational Health and Safety

Directive on Fire Protection

Standard on Emergency Evacuation Plans and Procedures

Standard on Fire Protection

Standard on Boilers and Pressure Vessels

[Treasury Board Fire Protection Standard](#)

[PSPC Asbestos Management Standard](#)

[Canada Occupational Health and Safety Regulations](#)

[Mechanical Design Standard MD 15161 – 2013 Control of Legionella in Mechanical Systems](#)

PSPC Legionella Communications & Actions Protocol

[MD 15000 – 2012, Mechanical Environmental Standard for Federal Office Buildings](#)

[Health Canada Indoor Air Quality in Office Buildings: A technical Guide](#)

[Health Canada - Guidelines for Canadian Drinking Water Quality](#)

PSPC Incident Management Standard

[Technical Guideline to asbestos exposure management programs \(GC\)](#)

American Conference of Governmental Industrial Hygienists (ACGIH), TLVs and BEIs Book

## **Accessibility**

[Treasury Board Accessibility Standard for Real Property](#)

[B651-18 Accessible Design for the Built Environment](#)

[Accessible Canada Act](#)

[Nothing Without Us: An Accessibility Strategy for the Public Service](#)

PSPC Accessibility Action Plan

RPS Accessibility Procedures

## **Commissioning**

PWGSC RPB Policy on Commissioning

Commissioning Standard

## **Sustainability and Green Government**

[Canadian Environmental Protection Act, 1999](#)

[Impact Assessment Act](#)

[The Federal Sustainable Development Strategy](#)

[Fisheries Act](#)

[Transportation of Dangerous Goods Act, 1992](#)

[Species at Risk Act](#)

[Canada Water Act](#)

[Environmental Code of Practice for Elimination of Fluorocarbon Emissions from Refrigeration and AC Systems](#)

PSPC Real Property Sustainable Development & Environmental Strategy

[Greening Government Strategy](#)

Project GHG Options Analysis Methodology

[Pan-Canadian Framework on Clean Growth and Climate Change](#)

Policy on Environmental Compliance and Sustainability

Directive on Strategic Environmental Assessment

[Migratory Birds Convention Act \(MBCA\) and Regulations](#)

## **Heritage**

RPB Policy on the Stewardship of Federal Heritage Buildings

RPB Procedure for the Stewardship of Federal Heritage Buildings

[A Guide to Working with the Federal Heritage Review Office](#)

## **Information Management**

[Library and Archives of Canada Act](#)

[Treasury Board Directive on Service and Digital](#)

[Treasury Board Policy on Service and Digital](#)

[Treasury Board Standard on Metadata](#)

[Treasury Board Standard on Geospatial Data](#)

[PSPC National CADD Standard](#)

PWGSC National CADD Standard Supplement - NCA

[PWGSC CADD Standards ToolKit & PWGSC TPSGC Block and Template](#)

ISO 19650 parts 1, 2 and 5

## **Risk Management**

[Treasury Board Project Complexity and Risk Assessment Tool V1.4](#)

[Treasury Board Guide to Integrated Risk Management](#)

[Treasury Board Framework for the Management of Risk](#)

[Annex B of the Directive on the Management of Projects and Programmes: Mandatory Procedures for Project Complexity and Risk Assessments](#)

PWGSC Risk Management Guide

PSPC Risk Management Plan Guide

PSPC Risk Management NCOE - NPMS RMP Template

## **Security and Planning**

Policy on Information Technology Security

## **Building Operations and Design**

MD 15128-2013 - Laboratory Fume Hoods: Guidelines for Building Owners

MD 15129, Guidelines for Perchloric Acid Fume hoods and Their Exhaust Systems

Seismic Standard

[ED 16200-2013: Elevators, Dumbwaiters, and Escalators](#)

[Technical Reference for Office Building Design](#)

GCworkplace Design Guide

GCworkplace Technical Reference Manual

GCworkplace Standard Furniture Typicals

## **Parking**

[Consolidated regulations: Government Property Traffic Act](#)

## **Inventory Management**

Policy on the Management and Reporting of Capital Assets

## **Shared Services Canada Technical Specifications**

TS-01 Premises Telecommunications Infrastructure Installation in Leased, Owned and Occupied Spaces Under Shared Services Canada Mandate

TS-09 Power and Cooling in Distributor (Telecom) Rooms

## **Other related Codes and Acts**

[Federal Identity Program \(FIP\)](#)

[Federal Identity Program Manual](#)

[Federal Identity Program Technical Specifications](#)

Government of Canada Workplace Fit-up Standards

[National Building Code of Canada 2015](#)

[National Energy Code of Canada for Buildings 2017](#)

[National Fire Code of Canada](#)

[National Plumbing Code of Canada 2015](#)

[Official Languages Act](#)