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Invitation to Qualify (ITQ) For Source List of Suppliers

Title Master Planning for Missions at Various International Locations	
Solicitation Number 20-165672	Date April 6, 2022
Application Delivery <p>In order for an Application to be valid, it must be received no later than 14:00 Eastern Standard Time (EST) (Ottawa, Ontario time) on May 16, 2022 (Ottawa, Ontario time) referred as the "Closing Date and Time".</p> <p>Only electronic copies will be accepted and received at the following e-mail address:</p> <p>realproperty-contracts@international.gc.ca</p> <p>Attention: Eric Rainville</p> <p>Solicitation #: 20-165672</p> <p>Suppliers should ensure that their name and the solicitation number are clearly marked in the e-mail subject line. Supplier should also ensure that their name, mailing address, phone number, emailing address are included in the e-mail Signature section.</p>	
THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT.	
<hr/> Signature	<hr/> Date



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1. Introduction

1.1. Overview

This Invitation to Qualify (ITQ) is divided into three (3) sections, plus seven (7) appendices, as follows:

Section 1 Introduction: provides a general description of the requirements under this ITQ, as well as definitions and interpretative rules;

Section 2 Contents of Application: describes the documents that will constitute the supplier's Application;

Section 3 Supplier Instructions: provides the instructions for submitting an Application.

Appendix "A.1" Services: Sets out in general terms the services for which Canada intends to qualify suppliers through this Invitation to Qualify process;

Appendix "A.2" Technical Requirements: indicates the technical standards and other information that the supplier must satisfy or demonstrate for Canada, in order to satisfy Canada that the supplier possesses the required technical qualifications and experience for the purposes of this ITQ;

Appendix "A.3" Basis of Selection: indicates the method whereby Canada will determine the suppliers who qualify under this ITQ process;

Appendix "A.4" Security Requirements Check List (SCRL): provides Canada's assessment of the security risks associated with the Services, and of the minimum security requirements to mitigate those risks;

Appendix "A.5" Competing for Subsequent Contracts: indicates how Canada will solicit proposals to Qualified Suppliers on the source list;

Appendix "B.1" Application and Certification Form: is the form containing the statements and information that a supplier must certify are true; and

Appendix "B.2" Technical Application: contains the forms, if Canada provides any, allowing the supplier to communicate its technical or substantive Application to fulfill Canada's requirements.

Appendices that are numbered "A" set out Canada's requirement and rules. Appendices that are numbered "B" must be completed by the supplier.

1.2. Summary

The Government of Canada (Canada), represented by the Minister of Foreign Affairs acting through the Department of Foreign Affairs, Trade and Development Canada (DFATD) requires a series of Master Plans for real property assets at missions in various international locations. A Master Plan is a comprehensive long-range strategy that is intended to voice and direct the vision, development and future of a community or set of assets. The objective of the Master Plan is to provide a clear vision, direction and steps moving forward with regards to physical real property assets at missions around the world. These Master Plans are intended to be a guide for DFATD on future investment planning and decision-making toward short, medium and long-term development projects.

The purpose of this ITQ is to establish a pre-qualified list of suppliers (hereinafter referred to as "Source List") who meet all of the mandatory criteria (see Appendix "A.2") to provide Her Majesty the Queen in Right of Canada (Canada), as represented by officials of the Department of Foreign Affairs, Trade and



Development (DFATD), with services for the Master Planning for missions at various international locations, as described in Appendix "A.1" (Services). Subsequently, solicitation opportunities will be competed amongst the pre-qualified suppliers on the Source List for Master Planning covering a variety of desired outcomes and needs.

The solicitation will be a two-stage process. The first stage will be: an Invitation to Qualify (ITQ), posted on the Government Electronic Tendering Service (GETS), provided on www.buyandsell.gc.ca/tenders. Following the ITQ, the Application evaluation committee will evaluate all Applications and successful suppliers will be placed on a Source List. The second stage will be: Canada will provide to Qualified Suppliers on the Source List notifications of requirements, further called solicitation documents for future requests for proposals (RFP) directly to one or more suppliers on the source list depending on the Bands described in Appendix "A.5".

Canada will post a notice of proposed procurement (NPP) on GETS every 12 months to qualify additional firms onto the existing Source List. Qualified Suppliers already on the Source List will not need to requalify and will remain on the Source List for its duration. Subsequent requirements will be solicited as described in Appendix "A.5" (Competing for Subsequent Contracts).

Only suppliers with the appropriate designated organizational clearance will be placed on the Source List. Refer to the Security Requirements Check List (SRCL) at Appendix "A.4" for the security level required.

1.3. Definitions

In this ITQ,

"Application" means the formal response by a supplier to the ITQ, and includes the filled Application and Certification Form comprising the filled and signed Application and Certification Form and the complete Technical Application;

"Closing Date and Time" means the exact date-and-time limit to submit an Application to Canada pursuant to this ITQ;

"Contract Advisor" means the representative of Canada who is tasked with running the Invitation to Qualify process, and the Application evaluation process;

"Day" means a calendar day;

"Qualified Supplier" means a supplier that, in Canada's reasonable determination, has satisfied the conditions of the Invitation to Qualify; and

"Services" means the goods and services set out in Appendix "A.1".

1.4. Trade Agreements:

The requirement is subject to the provisions of the following trade agreements:

- a. Canadian Free Trade Agreement (CFTA)
- b. Canada-UK Free Trade Agreement
- c. Canada-Chile Free Trade Agreement
- d. Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)
- e. Canada-Columbia Free Trade Agreement
- f. Canada-European Union Comprehensive Economic and Trade Agreement (CETA)
- g. Canada-Honduras Free Trade Agreement
- h. Canada-Korea Free Trade Agreement
- i. Canada-Panama Free Trade Agreement
- j. Canada-Peru Free Trade Agreement



- k. Canada-Ukraine Free Trade Agreement
- l. World Trade Organization-Agreement on Government Procurement (WTO-GPA)

For subsequent solicitations, the decisions on applicability of Trade Agreements will be made on case-by-case basis based on appropriate criteria.

1.5. Applicable Laws

This ITQ must be interpreted and governed by the laws in force in the province of Ontario, Canada.



2. Contents of Application

2.1. Complete Application:

A complete application comprises a completed Application and Certification Form and a Technical Application. Appendices "A.1", "A.2", "A.3" and "A.4" contain all the requirements that a supplier should address, including with the forms contained in Appendix "B.1" and "B.2".

2.2. Application and Certification Form:

2.2.1. Completed Form:

A supplier must include with its application the completed Application and Certification Form (being Appendix "B.1"), signed by the supplier or an authorized representative of the supplier. If any portion of the form is not completed and submitted with the application, Canada's Representative will inform the supplier of a time frame within which to provide the duly completed and signed form.

2.2.2. Ineligibility and Suspension Policy

As part of the Application and Certification Form, the supplier must submit an Integrity Declaration Form, to be found at: < <https://www.tpsgc-pwgsc.gc.ca/ci-if/documents/integrity-declaration-form-eng.pdf> >, or available upon request to Canada's Representative.

2.2.3. Rejected Certification:

Canada may reject an Application and give it no further consideration, if:

- a. the Application and Certification Form is incomplete, or unsigned within the specified time frame;
- b. the supplier cannot certify as true one or more of the statements contained in the form; or
- c. the supplier knowingly or unknowingly misrepresents as true in the form a statement that is not true.

2.2.4. Additional Information:

The supplier agrees that Canada's Representative will have the right to ask for additional information to verify the supplier's statements in the supplier's Application. The supplier's failure to comply with any such request or requirement by Canada's Representative and to cooperate with the latter will disqualify the Application.

2.2.5. Legal Capacity:

The supplier agrees to provide, if at any time requested by Canada, the best evidence of the supplier's capacity to contract, including any documentation indicating the laws under which the supplier is established, registered and incorporated, together with the registered or corporate name and place of business. This requirement also applies to each member of a supplier that is a Joint Venture.

2.3. Technical Application:

2.3.1. Responsive Technical Application:

The supplier must electronically submit a Technical Application that seeks to satisfy all the technical requirements indicated in Appendix "A.2". To be declared responsive, a Technical Application

- a. must comply with all the compulsory instructions of the ITQ which are evident from use of the word "must"; and
- b. must meet all mandatory technical requirements.



2.3.2. Forms for Technical Applications:

A supplier should include with its Application the completed form(s), if any, which are included in Appendix "B.2". The completed forms should constitute at least part, and possibly all of, the supplier's Technical Application.

2.3.3. Maximum Size of Technical Application:

A Technical Application must not exceed [thirty (30)] single-sided pages, plus resumes and brochures, globally to be no larger than [ten (10) MB]. Canada may decide to not consider any Technical Application that is longer or larger than these maximums.

2.3.4. Mandatory Requirements:

Suppliers must meet the mandatory requirements set out in Appendix "A.2" (Technical Requirements). Canada will discard and not give additional consideration to any Application that does not meet the mandatory requirements.

2.3.5. Purpose:

A supplier must electronically provide a Technical Application that contains all the information and documents requested in the Technical Requirements (Appendix "A.2"). If Canada accepts the supplier's Technical Application, the latter could become an annex to a future contract between Canada and the supplier.



3. Instructions to Suppliers

3.1. Binding Provisions

3.1.1. Binding Contract:

A person or entity who submits an Application ("supplier") agrees, by submitting the Application, to be contractually bound with Canada by the terms and conditions of this Invitation to Qualify. Canada may reject a supplier's Application when the supplier does not comply with these terms and conditions.

3.1.2. Application Validity:

The supplier's Application must remain valid for a minimum of twelve (12) months from the Closing Date and Time. Canada reserves the right to seek, within a minimum of one (1) Day before the end of the Application validity period, an extension of that period by written consent of all suppliers who submitted a valid Application. If all responsive suppliers accept the extension, Canada will continue with the evaluation of the Applications. If not all responsive suppliers accept the extension, Canada will, in its absolute discretion, either continue with the evaluation of the Applications of those who have accepted the extension, or will cancel the ITQ.

3.1.3. Government Electronic Tendering Service:

Canada will make available for download through the Government Electronic Tendering Service (GETS), www.buyandsell.gc.ca/tenders all documents that are relevant for the purposes of this ITQ. Canada is not responsible and will not assume any liabilities whatsoever for the information found on websites of third parties. In the event an ITQ or related documentation would be amended, Canada will not be sending notifications to suppliers. Canada will post all amendments, including significant enquiries received and their replies, using GETS. It is the sole responsibility of the supplier to regularly consult GETS for the most up-to-date information. Canada will not be liable for any oversight on the supplier's part nor for notification services offered by a third party.

3.1.4. Only Source of Requirements:

This ITQ, as amended or supplemented through GETS from time to time and including its appendices, contains all the requirements relating to Canada's ITQ. Canada will consider as irrelevant any other information or documentation provided to or obtained by a supplier from any other source.

3.2. Submission of Applications

3.2.1. Address:

Canada must receive the Applications at the e-mail address on the first page of this ITQ no later than the Closing Date and Time. This e-mail address is solely for the purpose of Application submission and of enquiries or suggestions concerning the ITQ. No other communications are to be forwarded to this address. Canada will not be responsible for Applications delivered to a different email address. Canada may reject Applications that are sent directly to Canada's Representative.

3.2.2. Failed Delivery:

Canada will take no responsibility if an Application is not received on time or is incomplete because the e-mail containing the whole or a portion of the Application was refused by a server. This could occur because:

- a. the size of attachments exceeds 10 MB;
- b. the e-mail contains executable code (including macros); or
- c. The e-mail contains files that are not accepted by Canada's servers, such as, but not limited to, .rar, encrypted .zip, encrypted .pdf, and .exe.

It is strongly recommended that suppliers confirm with Canada's Representative that their complete Application was received in full.



3.2.3. E-mails:

A supplier may send more than one e-mail for submitting an Application, but if the same file is sent twice, the latest file received will be used for evaluation purposes and the previous one(s) will not be opened. It is recommended that, when a supplier submits more than one (1) e-mail containing documents comprising the Application, the supplier ensures that the emails are numbered and the total number of emails sent in response to the ITQ is also identified.

3.2.4. Requirements:

In order to submit a valid Application, a supplier must submit in its Application the information and documents set out in Appendices "A.2", "A.4", "B.1" and "B.2".

3.2.5. Sufficient Demonstration:

A supplier must fully provide the necessary complete documentation and specific information to support any fact or assertion contained in the supplier's Application. A supplier's mere declaration of facts will not suffice for Canada to conclude those facts are supported.

3.2.6. Format:

Suppliers should follow these specifications for their Applications:

- a. all Application documents should be submitted **electronically** in Portable Document Format (.pdf) or Microsoft Office version format 2003 or greater;
- b. all Application documents and supporting information should be in either English or French;
- c. the minimum type face should be of 10 points;
- d. all material should be formatted to print on 8.5" x 11" (21 cm x 27,5 cm) or A4 paper; and
- e. for clarity and comparative evaluation, the supplier should respond using the same subject headings and numbering structure as in Appendix "A.2".

3.2.7. No Hyperlinks:

Canada will neither accept a hyperlink to an online storage service (such as Google Drive™ or Dropbox™) nor to another Website, nor a File Transfer Protocol (FTP) service access. Canada will not accept any other mean of transferring electronic files than as attachments to e-mails.

3.2.8. Supplier Responsibilities:

It is the supplier's responsibility to:

- a. obtain clarification of the requirements contained in the ITQ, if necessary, before submitting an Application;
- b. prepare its Application in accordance with the instructions contained in the ITQ;
- c. submit no later than the ITQ Closing Date and Time a complete Application;
- d. send its Application only to the email address specified on the first page of this ITQ;
- e. ensure that the supplier's name, and the ITQ number are clearly visible on the e-mail attachment(s) containing the Application; and
- f. provide a comprehensible and sufficiently detailed Application for a complete evaluation in accordance with the criteria set out in the ITQ.

3.2.9. Application Costs:

Canada will not pay to a supplier the latter's cost incurred in the preparation and submission of an Application in response to the ITQ. Costs associated with preparing and submitting an Application, as well as any costs incurred by the supplier associated with the evaluation of the Application, are the sole responsibility of the supplier.



3.2.10. No Promotion of Supplier's Interests:

Suppliers must not make any public comment, respond to questions in a public forum or carry out any activities to publicly promote or advertise their interest in performing the Services or in obtaining a contract. Canada may disqualify a supplier for breach of this provision.

3.2.11. Assignment:

An Application cannot be assigned or transferred, in whole or in part, and any such assignment or transfer will be void.

3.3. Application by a Joint Venture

3.3.1. Special Rules:

Any joint venture must comply with this section "Application by a Joint Venture".

3.3.2. Joint Venture – Definition:

A joint venture is an association of two or more parties, whether individuals, partnerships, corporations, trusts or other, who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred to as a consortium, to submit an Application together, acting as a single supplier, on a requirement. Suppliers who submit an Application as a joint venture must clearly indicate that they do so as a joint venture, and they must provide the following information:

- a. the name of each member of the joint venture;
- b. the name of the representative (agent or mandatary) of the joint venture, i.e. the member chosen by the other members to act on their behalf, if applicable; and
- c. the name of the joint venture, if applicable.

If the information is not clearly provided in the Application, or is incomplete, the supplier must provide the information on request by Canada's Representative.

3.3.3. Signatures and Representation:

The Application and any related proposals or contract must be signed by all the members of the joint venture, unless one member is appointed to act on behalf of all members of the joint venture. Canada's Representative may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the Application, any subsequent RFPs and any resulting contract. If a contract is awarded to a joint venture, all members of the joint venture will be jointly and severally or solitarily liable for the performance of any resulting contract.

3.4. Enquiries and Suggested Improvements

3.4.1. Enquiries and Suggestions:

All enquiries and suggested improvements in relation to this ITQ must be submitted in writing only to the email address on the first page, no later than seven (7) days before the Closing Date and Time. Canada has no obligation to answer any enquiry or suggestion received after the Closing Date and Time.

3.4.2. Procedure for Enquiries:

Suppliers must reference as accurately as possible the numbered item of the ITQ to which their question relates. Suppliers must apply sufficient care to explain each question in sufficient detail in order to enable Canada to provide an accurate answer that may be shared with other suppliers. Suppliers must ensure that technical enquiries that are of a proprietary nature are clearly marked "proprietary" for each relevant item. Items identified as "proprietary" will be treated as such, except where Canada reasonably determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that the supplier does so, so that the proprietary nature of a question is eliminated, and the enquiry can



be answered with copies to all suppliers. Canada reserves its discretion to refrain from answering questions that are framed so that they cannot be distributed to all suppliers.

3.5. After Applications Are Received

3.5.1. Scope of evaluations:

An evaluation team composed of representatives of Canada will evaluate each Application in accordance with all the requirements of the ITQ, including each supplier's Application and Certification Form (Appendix "B.1") and the Technical Application (Appendix "B.2").

3.5.2. Non-responsive Applications:

If, at any stage of the evaluation, Canada determines that a supplier does not respond to, or does not comply with, the requirements of this ITQ, Canada will consider the Application to be disqualified (which is the same as invalid or non-responsive), and will not give it any further consideration.

3.5.3. Property of Documents:

Applications received on or before or after the Closing Date and Time become the property of Canada. Canada cannot return Applications to suppliers, as those Applications are submitted to Canada electronically. All Applications will be treated in confidence, subject to the provisions of the *Access to Information Act* (R.S. 1985, c. A-1) and the *Privacy Act* (R.S., 1985, c. P-21), and other applicable law, or except to the extent Canada needs to disclose information to verify information contained in an Application.

3.5.4. Reviewed Documentation:

Unless otherwise specified in this ITQ, Canada must base its evaluation of Applications on information received, and will evaluate only the documentation provided with a supplier's Application. Except to the extent that specific information is expressly contained in its Application, a supplier must not assume that:

- a. Canada has any previous knowledge of the supplier's qualifications or other information; or
- b. its existing capabilities meet the requirements of this ITQ simply because those capabilities met previous requirements.

3.5.5. Conduct of Evaluation:

In conducting its evaluation of an Application, Canada may, but will have no obligation to:

- a. seek clarification or verification from a supplier regarding any or all information provided by the supplier with respect to the ITQ;
- b. contact any or all references supplied by the supplier to verify and validate any information submitted by the supplier;
- c. request specific information with respect to the supplier's legal status;
- d. conduct a survey of the supplier's facilities and examine the supplier's managerial and financial capabilities to determine if they are adequate to meet the requirements of the ITQ;
- e. verify any information provided by a supplier through independent research, the use of any government resources, or by contacting third parties; and
- f. at the supplier's sole cost, interview the supplier or any or all of the resources proposed by the supplier to fulfill the requirements of the ITQ, or both.

3.5.6. Time to respond::

Suppliers will have the number of Days specified in the request by Canada's Representative to comply with any request related to any of the items listed in Appendix "A.2.". Canada may declare an Application to be non-responsive when a supplier fails to comply with the request. Canada will determine that an Application is non-responsive in the event that any information supplied by a supplier or on the supplier's behalf is false, incomplete or misleading, whether the supplier knew or not, at the time of communication, that the information was false or incomplete, or could be considered misleading.



If additional time is requested by a supplier, the Canada's Representative may grant an extension in his or her sole discretion.

3.5.7. Rights of Canada:

Canada reserves the right to:

- a. reject any or all Applications received in response to the ITQ;
- b. cancel the ITQ at any time; and
- c. reissue the ITQ.

3.5.8. Rejection of Application:

Canada may reject an Application where:

- a. there is evidence satisfactory to Canada that:
 - i. the supplier is bankrupt or insolvent, or its activities are rendered inoperable for an extended period; or
 - ii. the supplier not in good standing with respect to tax, partnership law, corporate law or any other applicable rules;
 - iii. the supplier, any of its employees or any subcontractor/sub-consultant included as part of the Application seems to have committed fraud, bribery, or fraudulent misrepresentation, or has failed to comply with any law protecting individuals against any manner of discrimination; or
 - iv. the Supplier, a subcontractor/sub-consultant or a person who is to perform the Services is unsuitable or has conducted himself or herself improperly, as determined by Canada in its sole reasonable discretion; or
- b. with respect to current or prior transactions with the Government of Canada:
 - i. Canada has exercised its contractual remedies of suspension or termination for default with respect to a contract with the supplier, any of its employees or any subcontractor/sub-consultant included as part of the Application; or
 - ii. Canada determines that the supplier's performance on other contracts, including the efficiency and workmanship as well as the extent to which the supplier performed the work in accordance with contractual clauses and conditions, is sufficiently poor for one to doubt that the supplier, if awarded a contract, would successfully complete the Services; or
- c. the supplier, or any of its employees, agents or partners, or any of the supplier's sub-contractors/sub-consultant mentioned in the Application, is found by a court of law to have committed a criminal or penal offense and, in Canada's reasonable determination, the fact that Canada maintains a relationship with the supplier is likely to cause prejudice to Canada, including damage to Canada's reputation.

3.5.9. Multiple Applications:

Canada reserves the right to apply additional scrutiny, in particular, when Canada receives multiple Applications for the same ITQ, whether from a single supplier or from several suppliers that are, in Canada's sole determination, closely related. Canada reserves the right to reject any or all of the Applications submitted by such suppliers if their inclusion in the procurement process:

- a. would distort the evaluation of ITQs, leading to a result that would not reasonably be expected under prevailing market conditions, or would not provide good value to Canada; or
- b. their inclusion would have the effect of prejudicing the integrity and fairness of the process.

3.5.10. Conflict of interest—unfair advantage:

In order to protect the integrity of the procurement process, Canada may reject an Application if the supplier, any of its subcontractors / subconsultants, any of their respective employees or former employees:

- a. was involved in any manner in the preparation of the ITQ, or is in any situation of conflict of interest or appearance of conflict of interest relating to this ITQ or the ensuing process and contract award; or



- b. had access to information related to the ITQ that was not available to other suppliers and that would, in Canada's opinion, give or appear to give the supplier an unfair advantage.

3.5.11. No Conflict:

Canada will not consider that the experience acquired by a supplier who is providing or has provided the goods and services described in the ITQ to Canada (or similar goods or services) would, in itself, confer an unfair advantage to the supplier or create a conflict of interest. This supplier remains subject to the criteria established in Appendix "A.2."

3.5.12. Checking Conflicts:

Suppliers who are in doubt about a particular situation of potential conflict should contact Canada's Representative before the Closing Date and Time. By submitting an Application, the supplier represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The supplier acknowledges that it is within Canada's sole discretion to determine whether a conflict of interests, unfair advantage or an appearance of conflict of interests or unfair advantage exists.

3.5.13. Debriefings:

Within 15 Days upon notification of the process results by Canada to the supplier, a supplier may request a debriefing on the results of the ITQ process in relation to its Application. Canada may, in its sole discretion, provide the debriefing in writing, by telephone, or in person.

3.5.14. Challenges:

The Government of Canada established the Canadian International Trade Tribunal (CITT) to provide, in accordance with applicable Trade Agreements, a challenge mechanism for suppliers to raise complaints regarding the solicitation or evaluation of proposals or the actual process of contract award on a designated procurement. A supplier may raise concerns to Canada's Representative regarding the ITQ or the evaluation of Applications, in a first attempt to address the concern. If the supplier is not satisfied with this first attempt, it may file a complaint with the CITT. For more information, a supplier may contact the CITT toll free by telephone at 855-307-2488, or by visiting the CITT's website at: < <https://www.citt-tcce.gc.ca/en/home.html> >.



Appendix “A.1” Services

The Government of Canada (Canada), represented by the Minister of Foreign Affairs acting through the Department of Foreign Affairs, Trade and Development Canada (DFATD), has a need for developing a series of master plans as a roadmap of Canada's infrastructure at missions abroad. Canada will require a qualified and security cleared supplier to plan and develop these master plans. Canada plans to issue future requests for proposals (RFP) for specific requirements, as they are identified.

As a first step in producing the master plans, the retained supplier will collect, analyze and integrate all project requirements: current property conditions; future property needs, applicable codes, standards and regulations in force, and will explore the integration of sustainable technologies to meet Canada's green building requirements. The supplier will then, through a process of design reviews with Canada, be able to produce reports based on accurate and reliable information on existing conditions. The master plans will set out various options, each supported by sketches, schedules, cost estimations, project phasing plans, and an assessment of any potential impact on the diplomatic or consular mission's operations. Each report will include a long-term investment analysis that will also integrate mission regional and political realities and priorities along with operational costs and life cycle management costs.

Qualified Supplier is expected to work at any of Canada's current or future diplomatic missions abroad or those Missions located in Africa & the Middle East, Asia/Pacific, Europe and the Americas.

The following is an example Statement of Work for the services to be performed at Stage 2 on the future Individual Requirements/Contracts:

1. TITLE

Master Planning for Missions

2. OBJECTIVE

The Government of Canada, through the Department of Foreign Affairs, Trade and Development (also known as “Global Affairs Canada” or “GAC”), is seeking a Contractor/[Consultant](#) to be called upon for the development of Master Plans at any of its locations, known as “Missions”, where consular, trade, development and other services are offered. Those Missions are located in Africa & the Middle East, Asia/Pacific, Europe and the Americas.

3. BACKGROUND

The Minister of Foreign Affairs' primary responsibility covers the conduct of Canada's external affairs, including international trade and commerce and international development. To carry out the Minister's responsibilities, GAC operates an extensive network of missions outside Canada.

Within GAC, the Property Strategic Planning directorate (ARD) is responsible for the custodianship, investment and protection of these properties and will be the end users of the Master Plans. Supporting ARD is the Project Delivery, Professional & Technical Services directorate (AWD) made up of architects, engineers, project managers, IT, maintenance, security and sustainability specialists, – who will guide and provide quality assurance reviews to the Contractor/Consultant in the development of the Master Plans.



4. DEFINITIONS AND APPLICABLE DOCUMENTS

A “Master Plan” is a comprehensive long-range strategy that is intended to voice and direct the vision, development and future of a community or set of assets. The objective of the Master Plans for GAC is to provide a clear vision, direction and steps moving forward with regards to physical real property assets within Canada’s missions around the world. These Master Plans are to be a guide for GAC on future investment planning and decision-making toward short, medium and long-term development projects.
--end of paragraph

The Master Plans will be based on extensive research and analysis of existing conditions and projected needs of the mission and to provide recommendations that define and structure sustainable growth and change within the operations of GAC. The Master Plans will be required to balance a diversity of environmental, social, cultural, economic and political considerations including but not limited to, heritage, existing and future context, land use, government priorities, community amenities, accessibility, security and cultural and regional realities. The Master Plans will be developed in collaboration with GAC’s Property Strategic Planning Directorate (ARD) and Project Delivery Professional & Technical Services Directorate (AWD) as well as the communities where the missions are located. The Master Plans will provide graphically visual and clear documents, with the intent of openly communicating strategic vision and its implementation to various stakeholders as defined by GAC. It is expected that the Master Plans will assess a range of potential options to address key drivers and future needs and come forward with a recommended approach that is aligned with the vision established for the Mission. More specifically, the Master Plans will make recommendations on the investment and development opportunities over short, medium and long terms for specific missions.

The guiding principles of each Master Planning document are to:

- establish a real property investment road map that provides high performing value to Canada;
- provide safe and healthy work and living environments that support optimum well-being;
- demonstrate leadership in design excellence and sound stewardship of real property assets;
- be sustainable, fiscally responsible and contextually appropriate from the perspective of both Canada and its host government; and
- be aligned with Government of Canada priorities.

The objectives of the Master Plans are multifaceted and include:

- a long-term vision plan specific to each property;
- a framework for planning of asset acquisition, disposal and/or construction and development works in the short, medium and long terms;
- reductions in energy and carbon use, in water consumption, and in generating of waste;
- accommodation for all legal obligations to provide a safe and secure working and living environment (which GAC refers to as its “Duty of Care”);
- a sound financial investment management plan;
- flexibility to address evolving accommodation requirements;
- implementation strategies, Rough Order of Magnitude project and construction cost estimates; and

5. DESCRIPTION OF TASKS

The Contractor/Consultant, will develop Master Plans for specified countries. Delivered within a period of 12 months from contract award, the Master Plans will provide a strategic 20-year, phased development plan and support possible future Treasury Board submissions if required. Each Master Plan will be specific to each site. Each site will vary in occupancy and size between 20 to 400 people and up to 47,500 sq.m (12 acres) of land, have a mix of working, living and recreational accommodations, and may



have different annexing properties. Each will be subject to different security, geo-political, cultural, financial and environmental needs.

The Contractor/Consultant will develop each Master Plan in three (3) phases:

5.1. Phase 1: Investigation and Analysis

This phase of the work requires the Contractor/Consultant to familiarize itself with the specifics of the site, on the basis of documentation provided by GAC and through discussions with GAC subject matter experts. This entails the understanding of cultural conditions in Canada and the host country, the local property context, gathering of all of GAC's functional and operational requirements, reviewing Canada's historical presence in the country and on the site, reviewing the operational costs and financials of past projects, anticipating Canada's future needs for the property in order to assess gaps and opportunities of the sites' capacity and an assessment of market values of local property. The purpose of this phase is for the Contractor/Consultant to understand project requirements, as well as risks, constraints and opportunities that can be examined.

Specific tasks in Phase 1 include, but not limited to, are to:

- 5.1.1. meet with GAC to gather functional and operational requirements for security, seismic, accommodation policies and standards, facility management, environmental and sustainable, historical and current financial costs for maintenance and past projects at headquarters level; review all current condition information, technical documents and drawings GAC has on file;
- 5.1.2. coordinate and attend regular meetings amongst individuals identified by the GAC Departmental Representative. Prepare and distribute minutes, record decisions for all meetings and workshops, provide information session in this stage of the project;
- 5.1.3. undertake a site visit to meet with mission staff and local authorities having jurisdiction to form an understanding of past development practices in the region and review any local requirements and objectives for Master Planning. Tasks included but not limited to the site visit are;
- 5.1.4. review accuracy of site plan and all buildings and infrastructure elements;
 - 5.1.4.1. identify regulations applying to the property including but not limited to applicable zoning mechanisms, ground coverage and height restrictions, perimeter boundary requirements, historical protections on buildings and green spaces, etc.;
 - 5.1.4.2. summarize local construction practices and methodologies that are effective and efficient given the climate and the expertise of the local construction trades, and any gaps that are unusual to Canada's methods and practices;
 - 5.1.4.3. review with local green building council effective sustainable building measures that are common and effective in the region;
 - 5.1.4.4. assess operational and maintenance requirements and their financial impacts at mission level; review all current technical documents and drawings mission has on file;
 - 5.1.4.5. review with GAC and mission staff past and current geo-political conditions, real-estate and construction market conditions, social, cultural and economic drivers and projected growth or reduction in mission size; and
- 5.1.5. analyze findings and historical development patterns, current priority issues, and requirements for additional data collection required in order to establish condition of site and longevity and integrity of its built infrastructures. Additional data collection may include but is not limited to: building condition reports, property surveys, building and property evaluation, underground systems surveys, topographical and landscape plans, geotechnical studies/reports, preparation of as-built drawings, heritage assessment, and building code reports;

5.2. Phase 2: Visioning and Planning

Having acquired a strong foundation of knowledge from the investigation and analysis conducted in Phase 1, the Contractor/Consultant will now undertake visioning activities for the short, medium and long-term horizons of the properties, and consider viable demonstration options for the properties. The intent is



for the Contractor/Consultant to develop a comprehensive and integrated Vision for the Mission through a selection of Master Plan Guiding Principles. Five Vision sessions will be facilitated.

Specific tasks include but are not limited to:

- 5.2.1 development of initial diagrammatic studies and phasing of the options to be studied in a workshop environment and based on GAC feedback from Phase 1;
- 5.2.2 prepare and lead a workshop(s) with GAC where initial studies will be tabled and brainstorming further development will be undertaken. It will be at this workshop(s) where options are removed or added to the table, where priorities are agreed upon, and where goals, targets and objectives specific to the mission are defined; and
- 5.2.3 produce a comprehensive and integrated vision, including Master Plan Guiding Principles specific to the mission.

5.3. Phase 3: Development and Preparation

Having presented findings and developed an integrated Vision for the Mission, the Contractor/Consultant will undertake the development of the Demonstration Plan.

At each submission, GAC will require that the Contractor/Consultant obtain written authorization from GAC before proceeding to the next submission.

- 5.3.1 Options Submission
The intent of this submission is to generate options for the mission Master Plan, incorporating aspects of the analysis and Work accomplished in Phase 1 and 2 of the Work for submission and presentation to GAC and its planning review committee.
- 5.3.2 Master Plan Development Submission
The intent of this submission is to further develop and refine the preferred development option for submission and presentation to GAC and its planning review committee based on the minutes and feedback received from Concept Design submission.
- 5.3.3 Preliminary Submission
The intent of this submission is to advance the Master Plan to a preliminary submission to GAC in electronic and hardcopy formats and based on minutes and feedback received from the master plan development submission.
- 5.3.4 Final Draft Submission
The intent of this submission is to advance the Master Plan to a final draft for submission to GAC in electronic and hardcopy formats and based on written feedback from the preliminary submission.
- 5.3.5 Final Submission
The intent of this submission is to issue a final Master Plan in electronic and hardcopy formats and based on written feedback from the final draft submission.

Two optional phases are included in the Base Contract as follows:

- **Optional Phase 1a** - In the event that presently unknown factors arise during the Investigation and Analysis Phase that would require additional studies, the Contractor/Consultant will advise the Department Representative, and upon the written agreement of the Departmental Representative, Phase 1a will be confirmed with a defined scope of work. Examples of additional studies could include building systems condition reports, property surveys, building and property evaluation, underground systems surveys, topographical and landscape plans, geotechnical studies/reports, preparation of as-built drawings, and building code reports, and
- **Optional Phase 3a** - In the event that unknown factors identified during the Visioning phase or at the start of the Demonstration Plan would require additional studies, the Contractor/Consultant will advise the Department Representative, and upon the written agreement of the Departmental Representative, Phase 3a will be confirmed with a defined scope of work, to be determined at a later date.

6. DELIVERABLES



Upon receipt and presentation of the submission from the Contractor/Consultant to GAC planning review committee at each phase and sub-phases, written comments with authorization to proceed or not to proceed to the next phase will be provided to Contractor/Consultant.

6.1. Phase 1: Investigation and Analysis

Submit and present an investigation and analysis report on findings and anticipated development options to be studied in the following phases including selling, acquiring new property, expanding or reducing current property, replenishing or providing new building stock and infrastructures that meet the guiding principles and objectives of the Master Plan. This report will include;

- a. a photographic survey of the site and key elements that have potential impact to development;
- b. an executive summary;
- c. an analysis of local market conditions (availability of material, local labour force, or lack thereof, etc.);
- d. a risk assessment and management plan for the development of phase 2 and 3 of the Work; and
- e. a project delivery and communications plan to be used as a bench mark for tracking progress through the subsequent phases of Work to include: methodology for managing the Work; required staff and sub-contractors/sub-consultants required to implement the Work; project schedule with milestones and timelines; an approach for communication and consultation with GAC;

The Contractor/Consultant must submit the above as follows:

- a. Submit a draft outline of this report for review and approval by GAC.
- b. Upon approval of outline of the report, submit and present to GAC a 75% completed report.
- c. Upon approval of 75% report, submit and present the final Investigation and Analysis report.

6.2. Phase 2: Visioning and Planning

This phase of the Work takes GAC's comments from the previous phase, undertakes visioning activities for the short, medium and long-term horizons of the properties, and considers all available development options. The intent of this phase is for the Contractor/Consultant to take what it has learned in Phase 1 of the Work and develop a comprehensive and integrated vision for the mission including development of Master Plan Guiding Principles specific to the mission.

Specific tasks include but are not limited to:

- 6.2.1 development of initial diagrammatic studies and phasing of the options to be studied in a workshop environment and based on GAC feedback from Phase 1;
- 6.2.2 submit minutes, record of discussions and agreed upon approach from workshop(s) for review and approval by GAC;
- 6.2.3. based on outcome of workshop(s) prepare and submit Vision and Guiding Principles specific to the mission's Master Plan for endorsement by GAC; and
- 6.2.4. submit checklist of required sub-contracting investigations required to fill the gaps of missing data identified from Phase 1 of the Work that is required to advance to Phase 3 of the Work.

6.3. Phase 3: Development and Preparation

6.3.1. Concept Submission Deliverables

- 6.3.1.1. updated project delivery plan for Phase 3;
- 6.3.1.2. conceptual schematic drawings and renderings for each option and recommended phasing of work between short, medium and long terms;
- 6.3.1.3. a risk management plan and matrix for each option that includes low, medium and high risks associated to cost, time, local conditions, change in Government of Canada policy and operations, along with impacts and mitigating strategies;
- 6.3.1.4. report card for each option that reports effectiveness on reaching goals and objectives outlined in the mission vision and Guiding Principles;



- 6.3.1.5. Cost Plan per option which include high level project and construction costs;
 - 6.3.1.6. list of all local applicable regulatory bodies and regulations governing future development work;
and
 - 6.3.1.7. any other additional elements identified by GAC in order to further planning.

 - 6.3.2. Master Plan Development Submission
 - 6.3.2.1. site plan and 3d modelling of final option;
 - 6.3.2.2. revised risk management plan and matrix;
 - 6.3.2.3. revised report card on effectiveness of reaching goals and objectives outlined in the mission Vision and Guiding Principles;
 - 6.3.2.4. identification of priority activities rendered in drawing format through a site plan and 3d modelling, as required, as well as high level description of work for each recommended phase between short, medium and long term;
 - 6.3.2.5. updated Cost Plan with breakdown into Rough Order of Magnitude (ROM) elemental costs per phase;
 - 6.3.2.6. Financial Management Plan over the short, medium and long term;
 - 6.3.2.7. outline graph of development activities over a long term horizon;
 - 6.3.2.8. outline graph of anticipated and indexed investment costs over a long term horizon;
 - 6.3.2.9. outline graph of comparative operation costs (without new development) and operational cost savings post new development as a result of more efficient infrastructures and gained energy savings; and
 - 6.3.2.10. revised list of all local applicable regulatory bodies and regulations governing future development work.

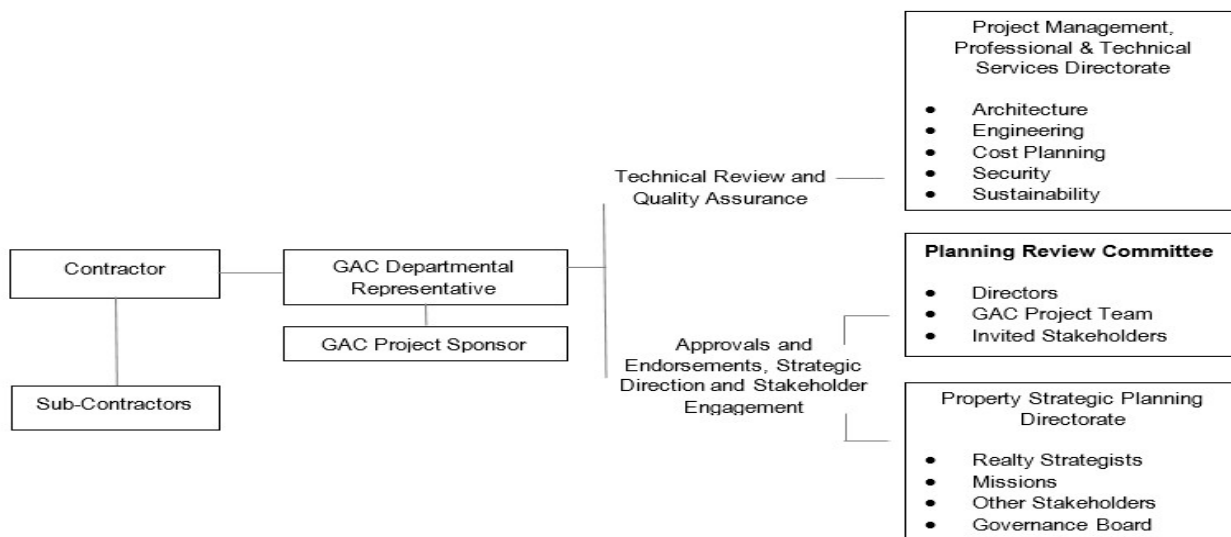
 - 6.3.3. Preliminary Submission
 - 6.3.3.1. all drawings, documents, report cards, tables, plans and graphs submitted previously and updated as per GAC's comments; and
 - 6.3.3.2. outline statements of work, project cost estimates, elemental construction cost estimates, project schedule for each phase and list of anticipated requirements per phase for future design Contractors/Consultants.

 - 6.3.4. Final Draft Submission
 - 6.3.4.1. all drawings, documents, report card, tables, plans and graphs submitted previously and now complete as per GAC's comments; and
 - 6.3.4.2. complete indicative level statements of work, project cost estimates, elemental construction cost estimates, project schedule for each phase and list of anticipated requirements for design Contractors/Consultants per phase.

 - 6.3.5. Final Submission
 - 6.3.5.1. all documents, report cards, tables, plans, drawings and graphs submitted previously and now fully coordinated and complete as per GAC's comments with full table of contents and document list signed and stamped by the lead licensed architect.
- Upon receipt of proposal of Final Submission, GAC will review and only provide written comments to Contractor/Consultant if the submission is deemed incomplete and requires to be resubmitted.

7. DEPARTMENTAL SUPPORT

The GAC project team, led by the GAC Departmental Representative, will provide quality assurance, strategic and technical advice to proceed throughout the various stages of preparation of the Master Plans including advice on inherent risks and tracking compliance with project requirements. The Contractor/Consultant will co-ordinate all work and submissions from their sub-contractors/sub-consultants and liaise directly with GAC's Departmental Representative throughout all phases of the work.



7.1. Presentations and Submissions

The GAC Departmental Representative will engage and co-ordinate all activities from the GAC project team and call the Planning Review Committee together to hear presentations by the Contractor/Consultant. Where hardcopy and digital submission are required in lieu of presentations, the GAC Departmental Representative will circulate submissions to the GAC project team for review. A summary of presentations and submissions is as follows:

		Presentation (in person or via video conference)	Submission (digital and hardcopy)
Phase 1	Investigation and Analysis Report	X	X
	Risk Management Plan	X	X
	Photographic Survey	X	X
	Communications and Project Delivery Plan	X	X
Phase 2	Workshops	X	
	Workshop Minutes		X
	Vision and Guiding Principals	X	X
	Checklist of Required Sub-Contractor Investigations	X	X
Phase 3	Concept Submission	X	X



	Master Plan Development Submission	X	X
	Preliminary Submission		X
	Final Draft Submission		X
	Final Submission		X

7.2. Applicable Government of Canada Policies and Standards

The Canada Labour Code, part 2, R.S.C. 1985, c. L-2 (not provided), applies to GAC's operations and construction. Furthermore, the following policies and standards are applicable to the development of the Master Plans and will either be provided by GAC or referenced during Phase 1 of the Work. They include but are not limited to:

- International Platform Branch Sustainable Development Strategic Framework; Heritage Policy (provided by GAC); and
- National Building Code of Canada, 2015 (not provided).

8. MEETINGS

Throughout the master planning process, meetings will occur between the Contractor/Consultant and GAC. The number of meetings will be defined in each contract. Some meetings will need to be in person and others can be held remotely, using technologies available to both GAC and the Contractor/Consultant. Below are some examples of the types of meetings that will be scheduled and the method to be used:

- Kick-off meeting – in person or remotely
- Presentations – in person or remotely
- Information sharing meetings – in person or remotely
- Status update meetings – in person or remotely
- Decision-making meetings – in person or remotely

9. TRAVEL

Travel to and from mission sites will be required during Phase 1: Investigation and Analysis. Travel to and from GAC Headquarters in Canada's National Capital Region could be required for presentations during each Phase.

All travel expenses related to the Master Plans must follow the Treasury Board Travel Directive.



Appendix “A.2” Technical Requirements

TR1. Mandatory Requirements

To qualify, suppliers must meet all of the Mandatory Requirements described below. Applications not meeting these requirements will be disqualified and not be given any further consideration. It is Canada's intention to establish a source list based on the suppliers meeting all Mandatory Requirements as a result of this solicitation.

Canada intends to pre-qualify suppliers based on the following mandatory requirements:

TR1.1. Security Requirement

- a. The supplier must hold a valid organization security clearance as indicated in the Security Requirements Check List (SRCL) at Appendix “A.4”;
- b. the supplier must provide the full addresses of the Bidder's and proposed individuals' sites or premises for which safeguarding measures are required for Work Performance as indicated in the Security Requirements Check List (SRCL) at Appendix “A.4”; and
- c. All proposed individuals MUST hold a valid Government of Canada security clearance at the level of SECRET at the time of the submission of the Application and during the performance of ANY Work. Failure to hold a valid security clearance at the time of submission and/or during the performance of ANY Work will result in the termination of any contract and/or the removal of the Supplier from the Source List.

TR1.2. Corporate Experience

The lead firm must have a minimum of ten (10) years' experience in the provision of master planning, in the past 15 years to bid closing date. Master planning includes plans that have been adopted by local municipalities or large government organizations that may be used as a guide for the future development. It may include design principals and objectives, phasing options, localized character and cultural reviews, assessment and recommended changes to zoning by-laws, studies of building to open spaces, etc. Master Planning does not include early design and massing studies of a large building complex.

The lead firm's experience in master planning shall include projects of mixed land use where estimated costs for implementation are in excess of \$20 million CAD.

TR1.3. Experience of Personnel

A supplier must have a variety of multi-disciplinary expertise available to undertake the preparation of the master plans. Suppliers must propose an individual to fill each of the following roles:

- a. Architecture: leading an architecture and engineering team;
- b. Engineering (civil, structural, environmental, geotechnical, mechanical and electrical);
- c. Project management;
- d. Real estate services;
- e. Quantity surveying;
- f. Scheduling;
- g. Urban planning;
- h. Heritage analysis and conservation services;
- i. Landscape design;
- j. Financial analysis and auditing;
- k. Sustainable development design services; and



I. Security specialists.

A supplier must have individuals leading each of the above disciplines (the “Key Individuals”) with a minimum 10 years’ experience practicing in their respective fields.

A single individual may not fill more than one role on the team, that is, cannot account for more than one Key Individual. Proof of valid Certification must be provided upon request.

Documentation exceeding two (2) pages per Key Individual will not be considered.



Appendix “A.3” Basis of Selection

Suppliers meet all mandatory technical evaluation criteria will be declared responsive and will be placed in the source list.

The source list is refreshed annually.

Any potential supplier not already on the source list can apply to be added to the list at any time and if no expiration date is contemplated for the list.

If a potential supplier who is not already on the source list submits a bid in response to an NPP published under a source list within the time period, Canada is required to examine the bid.



Appendix "A.4"

Security Requirements Check List (SRCL)



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

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

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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? ☒ No ☐ Yes
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

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

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

Document Number / Numéro du document :

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

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

☐ RELIABILITY STATUS
COTE DE FIABILITÉ

☐ CONFIDENTIAL
CONFIDENTIEL

☒ SECRET
SECRET

☐ TOP SECRET
TRÈS SECRET

☐ TOP SECRET - SIGINT
TRÈS SECRET - SIGINT

☐ NATO CONFIDENTIAL
NATO CONFIDENTIEL

☐ NATO SECRET
NATO SECRET

☐ COSMIC TOP SECRET
COSMIC TRÈS SECRET

☐ SITE ACCESS
ACCÈS AUX EMPLACEMENTS

Special comments:

Commentaires spéciaux :

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

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

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

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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

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PART C (continued) / PARTIE C (suite)

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	Confidential Confidentiel	Secret	Top Secret Très Secret	NATO Restricted NATO Diffusion Restreinte	NATO Confidential NATO Confidentiel	NATO Secret	COSMIC Top Secret COSMIC Très Secret	Protected Protégé			Confidential Confidentiel	Secret	Top Secret Très Secret
											A	B	C			
Information / Assets Renseignements / Biens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Media Support TI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Link Lien électronique	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

☒ No
Non

☐ Yes
Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée.

12. b) Will the document attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

☒ No
Non

☐ Yes
Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

Security Classification / Classification de sécurité



Contract Number / Numéro du contrat

Security Classification / Classification de sécurité

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

13. Organization Project Authority / Chargé de projet de l'organisme

Name (print) - Nom (en lettres moulées)

Serge Legault

Title - Titre

Manager - ARAS

Signature

Telephone no. - N° de téléphone

(343) 203-8231

Facsimile - Télécopieur

E-mail address - Adresse courriel

serge.legault@international.gc.ca

Date

2019-11-13

14. Organization Security Authority / Responsable de la sécurité de l'organisme

Name (print) - Nom (en lettres moulées)

Magdalena.kostrz@international.gc.ca

Title - Titre

A/contract security coordinator

Signature

Telephone no. - N° de téléphone

343-203-6856

Facsimile - Télécopieur

E-mail address - Adresse courriel

magdalena.kostrz@international.gc.ca

Date

2019-11-18

15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?

Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

☐

No

☐

Yes

☐

Yes

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées)

Title - Titre

Signature

Telephone no. - N° de téléphone

Facsimile - Télécopieur

E-mail address - Adresse courriel

Date

17. Contracting Security Authority / Autorisé contractante en matière de sécurité

Name (print) - Nom (en lettres moulées)

Title - Titre

Signature

Telephone no. - N° de téléphone

Facsimile - Télécopieur

E-mail address - Adresse courriel

Date

Security Classification / Classification de sécurité



Appendix “A.5” Competing for Subsequent Contract

Once the source list is established, Canada will compete opportunities amongst the Qualified Suppliers. The required timeframe for each solicitation will vary in length depending on the project's scope but will typically range anywhere from 10 days to 40 days.

Below is a high level description of the steps for subsequent process:

Step 1: Solicitation

Canada will provide to Qualified Suppliers notifications of opportunity (further called “Solicitation”). Solicitation documents, Requests for Proposals (**RFPs**) will be sent directly to Qualified Suppliers from Canada's Representative by email. Solicitations will stipulate the maximum amount to be awarded and will be categorized based on the following dollar values. The values are in Canadian Dollars and are inclusive of applicable taxes:

Solicitation Methods

Supplier must clearly indicate at the time of their submission what bands they are interested in being evaluated against.

Band #	Strategy	Application	Threshold
Band 1	Sole Source	When exemption (b) (iii) or (b) (iv) of section 6 of the Government Contract Regulations applies.	Work up to \$40K CAD, taxes and fees included, for general services. Work up to \$100K CAD, taxes and fees included, for architecture and engineering services.
Band 2	Limited Tendering	When trade agreements do not apply. Solicitation to a minimum of three (3) proponents.	Work up to \$100K CAD, taxes and fees included.
Band 3	Electronic Tendering	When a requirement is subject to trade agreements, the solicitation will be competed electronically on the Government Electronic Tendering Service (GETS).	Work up to \$3.75M CAD, taxes and fees included, for general services. Work up to \$2M CAD, taxes and fees included, for architecture and engineering services.

Step 2: Engagement

Band 1 – Canada will select one Qualified Supplier from the source list to enter into a contract with.

Band 2 – Three or more Qualified Suppliers will be selected from the source list by Canada to participate in a selective tender process.

Band 3 - All Qualified Suppliers on the source list will be issued a request for expression of interest. Suppliers must self-identify interest to compete for the specific opportunity within 2 calendar days.



This will be accomplished through a notification from Canada's Representative by email. The interested Suppliers will be selected by Canada, and invited to bid.

Step 3: Bid Submissions

The selected Suppliers will submit their bids in accordance with the instructions identified in the solicitation document.

Step 4: Bid Evaluations

- a. Bids will be evaluated in accordance with the solicitation document.
- b. The basis of selection will be stipulated in the solicitation document. The contractor/consultant selection methods to be used in the RFP will be one of the following:
 - Selection on the basis of the lowest priced responsive bid
 - Selection on the basis of the responsive bid having the lowest cost-per-point
 - Selection on the basis of the responsive bid having the highest combined rating of technical merit and price
- c. Opportunities procured under the source list will be subject to security requirements. Each solicitation and/or contract will identify the applicable security requirements.

Step 5: Contract Award

One or multiple contracts may be awarded amongst successful bids for each solicitation.



Appendix "B.1"

Application and Certification Form

In the matter of Canada's Invitation to Qualify (ITQ) no. 20-165272, dated 2022-04-06 in relation to proposed procurement processes for Master Planning for Missions, Various International Locations

1. We hereby apply to become a Qualified Supplier, and my Application contains the following documents:
 - a. a completed and signed Application and Certification Form (Appendix "B.1"); and
 - b. a Technical Application (Appendix "B.2").
2. Capital Letters: Capitalized terms in this Form, if there are any, have the same meaning as in the ITQ. This Attachment "B.1" may become an appendix of a contract signed between Canada and the supplier that relates to the ITQ.
3. Terms and Conditions: The supplier certifies to have read and understood the ITQ, including its appendices, and fully agrees to all its terms and conditions, having received all legal and other expert advice required for understanding the documentation.
4. Incapacity to Contract with Government: By submitting an Application, the supplier certifies that neither the supplier nor any of the supplier's affiliates has ever been convicted of an offence under any of the provisions listed below. Canada may reject an Application where the supplier, including the supplier's officers, agents and employees, has been convicted of an offence under the following provisions of the Canadian *Criminal Code*:
 - a. paragraph 80(1)(d) (False entry, certificate or return), subsection 80(2) (Fraud against Her Majesty) or section 154.01 (Fraud against Her Majesty) of the Financial Administration Act, or
 - b. section 121 (Frauds on the government and Contractor subscribing to election fund), section 124 (Selling or Purchasing Office), section 380 (Fraud) for fraud committed against Her Majesty or section 418 (Selling defective stores to Her Majesty) of the Criminal Code of Canada, or
 - c. section 462.31 (Laundering proceeds of crime) or
 - d. sections 467.11 to 467.13 (Participation in activities of criminal organization) of the Criminal Code of Canada, or section 45 (Conspiracies, agreements or arrangements between competitors), 46 (Foreign directives) 47 (Bid rigging), 49 (Agreements or arrangements of federal financial institutions), 52 (False or misleading representation), 53 (Deceptive notice of winning a prize) under the Competition Act, or
 - e. section 239 (False or deceptive statements) of the Income Tax Act, or
 - f. section 327 (False or deceptive statements) of the Excise Tax Act, or
 - g. section 3 (Bribing a foreign public official) of the Corruption of Foreign Public Officials Act, or
 - h. section 5 (Trafficking in substance), section 6 (Importing and exporting), or section 7 (Production of substance) of the Controlled Drugs and Substance Act, or under any provision under any law other than Canadian law having a similar effect to the above-listed provisions, including any one sanctioning crimes against another government or a public authority.

This requirement also applies to each member of a supplier that is a Joint Venture, as well as to their officers, agents, mandataries or employees.

5. Lobbying: The supplier certifies that the it has not, directly or indirectly, paid or agreed to pay, and will not, directly or indirectly, pay, a contingency fee to any individual for the solicitation, negotiation or obtaining of the Contract if the payment of the fee would require the individual to file a return under the section 5 of the Canadian *Lobbying Act*.



6. Sanctions: The supplier certifies that it is not under sanction, for corrupt, fraudulent, collusive, coercive or other objectionable practice, imposed by a government, a governmental entity such as a state-owned enterprise, or an international organization such as the World Bank. The supplier is not, and has no partner, employee or associate who is, the object of sanctions imposed by Canada against another country or its nationals, implemented pursuant to Canadian legislation, including the *United Nations Act*, the *Special Economic Measures Act*, or the *Export and Import Permits Act*.
7. Integrity:
- a. The *Ineligibility and Suspension Policy* (the "Policy") in effect on the date the ITQ is issued, and all related directives in effect on that date, are incorporated by reference into, and form a binding part of the ITQ. The supplier must comply with the Policy and directives, which can be found at: < <http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html> >. Under the Policy and this ITQ, "PWGSC" and "Public Works and Government Services Canada" each means the Department of Public Works and Government Services of the Government of Canada, presided over by the Minister of Public Works and Government Services.
 - b. Under the Policy, charges and convictions of certain offences against a supplier, its affiliates or first tier subcontractors/subconsultants, and other circumstances, will or may result in a determination by PWGSC that the supplier is ineligible to enter, or is suspended from entering, into a contract with Canada. The list of ineligible and suspended suppliers is contained in PWGSC's Integrity Database. The Policy describes how enquiries can be made regarding the ineligibility or suspension of suppliers.
 - c. The supplier must provide the following:
 - i. by the time stated in the Policy, all information required by the Policy described under the heading "Information to be Provided when Bidding, Contracting or Entering into a Real Property Agreement"; and
 - ii. with its Application, a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors/subconsultants that, to the best of its knowledge and belief, may be similar to one of the listed offences in the Policy. The list of foreign criminal charges and convictions must be submitted using an Integrity Declaration Form, which can be found at: < <http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html> >.
 - d. By submitting an Application in response to this ITQ, the supplier certifies that:
 - i. it has read and understands the *Ineligibility and Suspension Policy* (< <http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html> >);
 - ii. it understands that certain domestic and foreign criminal charges and convictions, and other circumstances, as described in the Policy, will or may result in a determination of ineligibility or suspension under the Policy;
 - iii. it is aware that Canada may request additional information, certifications, and validations from the supplier or a third party for purposes of making a determination of ineligibility or suspension;
 - iv. it has provided with its Application a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors/subconsultants that, to the best of its knowledge and belief, may be similar to one of the listed offences in the Policy;
 - v. none of the domestic or foreign criminal offences, and other circumstances, described in the Policy that will or may result in a determination of ineligibility or suspension, apply to it, its affiliates and its proposed first tier subcontractors/subconsultants; and
 - vi. it is not aware of a determination of ineligibility or suspension issued by PWGSC that applies to it.
 - e. If a supplier is unable to provide any of the certifications required by paragraph **Erreur ! Source du renvoi introuvable.**, it must submit with its Application a completed Integrity Declaration Form, which can be found at: < <http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html> >.



- f. Canada will declare non-responsive any Application, in respect of which the information requested is incomplete or inaccurate, or in respect of which the information contained in a certification or declaration is found by Canada to be false or misleading in any respect. If Canada establishes after award of a contract that the supplier provided a false or misleading certification or declaration, Canada may terminate the contract for default. Pursuant to the Policy, Canada may also determine the supplier to be ineligible for award of a contract for providing a false or misleading certification or declaration.
8. Federal Contractors Program for Employment Equity – Certification: For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\) – Labour's](#) website.

Date: _____ (YYYY/MM/DD) (If left blank, the date will be deemed to be the RFP closing date (the date of the Closing Date and Time).

Complete both A and B.

A. Check only one of the following:

- () A1. The supplier certifies having no work force in Canada.
- () A2. The supplier certifies being a public sector employer.
- () A3. The supplier certifies being a federally regulated employer being subject to the *Employment Equity Act*.
- () A4. The supplier certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).
- A5. The supplier has a combined workforce in Canada of 100 or more employees; and
- () A5.1. The supplier certifies already having a valid and current Agreement to Implement Employment Equity (AIEE) in place with ESDC-Labour.
- OR
- () A5.2. The supplier certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- () B1. The supplier is not a Joint Venture.
- OR
- () B2. The supplier is a Joint venture and each member of the Joint Venture must provide Canada's Representative with a completed response to the questions in this paragraph 8.

9. Truth: The supplier agrees that if, at any time, Canada finds one of the statements in the supplier's Application and Certification Form, or in the supplier's Application, to be untrue at the time they were submitted, Canada will be entitled to disqualify the supplier's Application or declare any subsequent proposal by the supplier or contract between Canada and the supplier, if any, to be immediately



rescinded, without prejudice to Canada's rights to exercise any other remedy. The supplier will be foreclosed from claiming any damage to Canada in relation to this disqualification or rescission.

10. Legal Capacity: The supplier hereby certifies that it has the legal capacity to contract and no restriction on this capacity. If the supplier is a Joint Venture, it certifies that all members of the Joint Venture have the legal capacity to contract and no restriction on this capacity.
11. Solemn Declaration: I solemnly declare that all my above statements constitute the truth, the whole truth, and only the truth, and that they should not mislead anyone.

Name & Signature of Authorized Individual

I have authority to bind the supplier.

Date

Sworn before me:

Signed

Name of Commissioner of Oath

Seal



Appendix "B.2" Technical Application

TA1. MANDATORY TECHNICAL CRITERIA

The Application must meet the mandatory technical criteria specified below. Suppliers must provide the necessary documentation to support compliance with this requirement. Failure to meet the mandatory requirements will render the Application as non-responsive.

Suppliers should clearly cross reference the page number of each rated technical criterion to the Application.

The mandatory criteria listed below will be evaluated on a simple met/not met (i.e. responsive/non-responsive, compliant/non-compliant) basis.

Mandatory Technical (MT) Criteria Compliance Checklist

MT Criteria Description	Information to be Provided	Cross Reference	Met/Not Met
MT1. Corporate Experience The lead firm must have a minimum of 10 years of experience in the past 15 years to bid closing date providing master planning services that have included: <ul style="list-style-type: none">1) Conducting stakeholder visioning exercises;2) Establishing design principals and objectives;3) Providing phasing options;4) Documenting and responding to localized character and cultural contexts,5) Demonstrating current understanding of how buildings and open spaces coincide effectively together The lead firm must demonstrate the provisions of these services over a minimum of two (2) and maximum four (4) master plan projects. Massing studies and early design activities on a large building complex does not constitute a master plan project.	a) The full legal name of the supplier		
	b) Identification of the supplier's proposed team (i.e. parties to the Application). This includes, as applicable, all joint venture or consortia members, partners and any major subcontractors/subconsultants with which the Supplier will foresee an work;		
	c) title of project(s), location (city, country);		
	d) brief description of project scope, cost in CAD and schedule		
	e) gross area of urban planning and gross area of building complex		
	f) start and end dates of participation in the project (MM-YYYY);		
	g) supplier's corporate role in the project;		
	h) client references (name of contact, title, telephone, e-mail); and		
	i) design awards, publications.		
MT2. Experience of Personnel	Documentation no longer than two (2)		



<p>The supplier must have a variety of multi-disciplinary expertise available to undertake the preparation of the master plans, and have individuals leading each discipline (the "Key Individuals") with a minimum of 10 years' experience within the last 15 years to bid closing date, as listed above in MT1 Corporate Experience. Suppliers must propose an individual to fill each of the following roles:</p> <ol style="list-style-type: none">1) Architecture: leading an architecture and engineering team;2) Engineering (civil, structural, environmental, geotechnical, mechanical and electrical);3) Project management;4) Real estate services;5) Quantity surveying;6) Scheduling;7) Urban planning;8) Heritage analysis and conservation services;9) Landscape design;10) Financial analysis and auditing;11) Sustainable development design services; and12) Security specialists.	<p>pages per Key Individual; resumes and reference letters must be submitted for evaluation.</p> <p>To facilitate evaluation, information about the Key Individual should include:</p> <ul style="list-style-type: none">• area(s) of expertise of each Key Individual;• Details on relevant certifications, degrees, diplomas;• individuals' years of experience; and• responsibilities held by Key Individuals for projects they have completed. <p>Documentation exceeding two (2) pages per Key Individual will not be considered.</p> <p>A single individual may not fill more than one role on the team, that is, cannot account for more than one Key Individual. Proof of valid Certification must be provided upon request.</p>		
<p>MT3. Human Resources Plan</p> <p>The supplier must demonstrate that it has the capacity and flexibility to support the contract by providing a human resources plan for the staffing, retention and replacement of the multidisciplinary experts, within a maximum of eight pages.</p>			

TA2. ADDITIONAL CERTIFICATIONS

The Supplier must also accept the following clauses to ensure that key individuals remain on the contract for the duration and to ensure that any replacement must meet the same criteria and be satisfactory to GAC.



TA2.1 UNAVAILABLE RESOURCE

If, at any point in time for the period during which the Supplier's Application is valid (as set out in section 3.1.2 of this ITQ), the Supplier would be unable to provide the Services of a Key Individual, the Supplier must:

- a. immediately notify Canada of the unavailability of that Key Individual, and of the reason; and
- b. within fourteen (14) days of the notification to Canada, upon identifying the substitute, immediately provide to Canada the name and a résumé of the proposed substitute, showing his or her qualifications and experience, and explain how the substitute meets or exceeds the requirements of this ITQ.

TA2.2 OTHER RESOURCE

If the Supplier proposes as a substitute an employee who is not an employee of the Supplier, the Supplier must provide to Canada the signed written consent of that person, satisfactory to Canada, that sufficiently evinces the individual's consent to propose his or her services to the Supplier, and his or her availability, in relation to the Services to be eventually performed. The Supplier must also submit to Canada that person's résumé showing his or her qualifications and experience, and any other supporting documentation requested by Canada.

TA2.3 CANADA'S APPROVAL

Canada must approve any substitution of an individual listed as a Key Individual. Any substitution that is not approved by Canada would disqualify the Supplier. Canada may reject a substitution for any reason related to this ITQ, including because, in Canada's sole reasonable determination, the individual:

- a. does not meet the Security Requirements;
- b. does not have all the relevant professional certification and licensing required to lawfully perform his or her portion of the Services, whether in Canada or abroad;
- c. does not have equal to, or higher qualifications, and experience than the unavailable individual;
- d. appears to Canada to be incompetent; or
- e. appears to have conducted herself or himself improperly.

TA2.4 PROCESS IF REJECTION

If Canada rejects a proposed substitution, then the Supplier may either propose another substitute within fourteen (14) days of Canada's rejection, or withdraw from the Application and lose the status of Qualified Supplier.

TA3. SECURITY REQUIREMENTS

At the date of bid closing, the following conditions must be met:

- a. the Bidder must hold a valid organization security clearance as indicated in Appendix "A.4" Security Requirements Check List (SRCL);
- b. the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Appendix "A.4" Security Requirements Check List (SRCL);
- c. the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;

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



For Foreign Recipient Contractor/Consultant, at the date of bid closing, the following conditions must be met:

- a. The Foreign Recipient Contractor/Consultant must identify an authorized Contract Security Officer (CSO) to be responsible for the overseeing of the security requirements, as defined in this contract. This individual will be appointed by the proponent Foreign Recipient Contractor/Consultant's Chief Executive Officer or Designated Key Senior Official, defined as an Owner, Officer, Director, Executive, and/or partner who occupies a position which would enable them to adversely affect the organization's policies or practices in the performance of the contract.
- b. Until the Foreign recipient's responsible National Security Authority (NSA) or Designated Security Authority (DSA) for industrial security of their country has provided Canadian DSA with the required written Personnel Security Screening assurances, the Foreign recipient Contractor/Consultant personnel SHALL NOT HAVE ACCESS to SECRET CANADA PROTECTED / CLASSIFIED information/assets, and SHALL NOT ENTER "Government of Canada" or "Contractor/Consultant" sites where such information or assets are kept, without an escort. An escort is defined as "a Government of Canada" or "Contractor/Consultant" employee who holds the appropriate Personnel Security Clearance at the required level.
- c. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of their respective National Security Authority (NSA) or Designated Security Authority (DSA), in accordance with the National legislation, regulations and policies of their country / the Canadian DSA.
- d. The Foreign Recipient Contractor/Consultant shall not use the CANADA PROTECTED / CLASSIFIED information/assets for any purpose other than for the performance of the Contract without the prior written approval of the Government of Canada. This approval must be obtained from the Canadian DSA.
- e. The Foreign Recipient Contractor/Consultant visiting Canadian Government or industrial facilities, under this contract, will submit for approval a Request for Visit form to Canada's Designated Security Authority (DSA) through their respective National Security Authority (NSA) or Designated Security Authority (DSA).
- f. The Foreign recipient Contractor/Consultant shall immediately report to the Canadian DSA all cases in which it is known or there is reason to suspect that CANADA PROTECTED / CLASSIFIED information/assets pursuant to this Contract has been compromised.
- g. The Foreign recipient Contractor/Consultant shall not disclose CANADA PROTECTED / CLASSIFIED information/assets to a third party government, person, firm or representative thereof, without the prior written consent of the Government of Canada. Such consent shall be sought through the recipient's National Security Authority/ Designated Security Authority (NSA/DSA) / Canadian DSA.
- h. The Foreign recipient Contractor/Consultant must comply with the provisions of the Security Requirements Check List attached at Appendix "A.4".

Name & Signature of Authorized Individual

I have authority to bind the supplier.

Date