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# Functional Program Services **TERMS OF REFERENCE**

## **ISC and IOGC Office Co-Location**

**For:**  
**Indigenous Services Canada  
(ISC) and Indian Oil and  
Gas Canada (IOGC)**  
**Tsuut'ina First Nation,  
Alberta**

February 15, 2022



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# 1 PROJECT DESCRIPTION

## 1.1 GENERAL

### 1.1.1 PURPOSE OF THE TERMS OF REFERENCE (TOR)

- .1 Public Works & Government Services Canada (PWGSC) requires the services of an architectural firm (Consultant) for the delivery of services required for a functional program and Indigenous community engagement process, considering the co-location of ISC and IOGC to a single shared office.

### 1.1.2 PROJECT INFORMATION

Project Information	
Project Title:	ISC and IOGS Office Co-location
Project Location:	Tsuut'ina, Alberta
Contract Number:	
PWGSC Project Number:	R.107605.001
PWGSC Departmental Representative:	Youcef Brahimi

## 1.2 BACKGROUND INFORMATION

### 1.2.1 CONTEXT

- .1 The combined Indigenous Services Canada (ISC) and Indian Oil and Gas Canada (IOGC) Office is to be located on Tsuut'ina Nation, whose reserve borders the southwestern city limits of Calgary, Alberta, and spans a large area in southern Alberta (283 km<sup>2</sup>). Therefore, the traditional and present-day knowledge held by members of the local community is critical information for the successful implementation of this project. It is of paramount importance for the consultant to recognize and appreciate this context and practice cultural sensitivity at all times.
- .2 It is equally important that this undertaking is to support the Tsuut'ina community as they are, and have been, the long-established experts on the preservation, conservation and responsible use of the area. Ultimately, the consultant must be aware that this project is part of the larger efforts for reconciliation across Canada, and must support the on-going development of a positive relationship between the Government of Canada and the local Indigenous community.
- .3 The Tsuut'ina language (known as Sarcee) is an Athabaskan/Dene language of northern Canada that is considered to be endangered. It is important that this undertaking fosters protection of the Sarcee language wherever possible.
- .4 In the spirit of Reconciliation, this project is an opportunity for the Government of Canada to welcome the local people of the Tsuut'ina community into the ISC and IOGC federal offices, and aims to develop a means for the people of Tsuut'ina First Nation to mutually



welcome the Government of Canada into their community through engagement and sharing of Indigenous Knowledge (IK) through long-term relationship building. In addition to fulfilling the needs of ISC and IOGC, wherever possible the project team is to foster on-going community interaction in the space that supports learning opportunities for the Indigenous community and cultural exchange.

### **1.2.2 USER DEPARTMENT**

- .1 The User Departments referred to throughout the TOR are Indigenous Services Canada (ISC) and Indian Oil and Gas Canada (IOGC).
- .2 Indigenous Services Canada (ISC) works collaboratively with partners to improve access to high quality services for First Nations, Inuit and Métis. Their vision is to support and empower Indigenous peoples to independently deliver services and address the socio-economic conditions in their communities.
- .3 Indian Oil and Gas Canada (IOGC) is an organization committed to managing and regulating oil and gas resources on First Nation reserve lands. They engage with First Nations and industry to explore and develop First Nation oil and gas resources, and negotiate, review, issue and administer contracts between First Nations, industry and IOGC.

### **1.2.3 USER DEPARTMENT'S NEED**

- .1 Using the Government of Canada Workplace Fit-up Standards Program of Work, ISC and IOGC have identified a need to implement a Functional Program to identify each of their unique operational needs and identify areas where there may be synergies among the requirements in a co-located office fit-up and,
  - .1 In order to capitalize on the opportunity to create a modernized workplace environment which will impact the traditional ISC and IOGC office accommodation by changing the way people are accommodated at work now and into the future.
  - .2 ISC and IOGC need to confirm if they need two separate demised areas or if they can share all office and support space, and just maintain two separate public access points/receptions.
  - .3 ISC and IOGC staff currently work a combination of in the office and from home; they need to determine how this will impact their office and support space requirements.
  - .4 The Functional Program will help to establish the follow on requirements for the January 1, 2026 In service date.
  - .5 ISC's and IOGC's new space needs to provide a high level of operational efficiency to allow each team member to function with flexibility, focus and high performance in the delivery of their services to Canada's First Nations in their new space.
  - .6 Through this Functional Programming, the consultant is to determine the required amount of office and special purpose space required.



- .7 The Functional Programming is to be informed by a sound Indigenous community engagement process, in effort to build relationships with members of the community, and ensure First Nations community member participation in the decision-making process.
- .8 Should alternate locations be identified as options to accommodate the client group needs, First Nations community member participation is required to identify mutually suitable locations within their community for the office.

#### **1.2.4 EXISTING CONDITIONS**

- .1 ISC is currently located in the Chief Big Plume building in the Tsuut'ina First Nation, and occupies 518.6 m<sup>2</sup>u /632.8 m<sup>2</sup>r of combined office and special purpose space on the 3<sup>rd</sup> floor.
  - .1 Special Purpose space (approximately 230m<sup>2</sup>)
  - .2 ISC's business lines include the Regional Operations (15 FTEs) and FNIHB Programs (8 FTEs), EPHS (6 FTEs), EPHS Administration (1 FTE) and NIHB Tpt Driver (1 FTE) equals 31 FTEs.
  - .3 The existing conditions provide accommodation for 26 FTEs and 474.4 m<sup>2</sup>u office space giving a space target utilization rate of 14.0m<sup>2</sup>u/FTE.
- .2 ISC staff have co-located with Indian Oil and Gas in the past and would like to continue the colocation in future years.
- .3 IOGC is also currently located in the Chief Big Plume building in the Tsuut'ina First Nation, and occupies about 1513.5 m<sup>2</sup> of combined office 1151.2m<sup>2</sup>u and special purpose space 362.3m<sup>2</sup>u on the 1<sup>st</sup> and 4<sup>th</sup> floors.
  - .1 Special Purpose space (362.3m<sup>2</sup>)
  - .2 The existing conditions provide accommodation for 95 FTEs, and a space utilization rate of 12.1m<sup>2</sup>u/FTE
- .4 The existing office and special purpose spaces may change with combined operations and may not be indicative of future functional and operational requirements for the new location.

#### **1.2.5 CHALLENGES AND CONSTRAINTS**

- .1 All site visits must be arranged through the Departmental Representative.
  - .1 The current COVID Pandemic situation may result in limited/delayed access to the sites.

### **1.3 OUTLINE OF WORK**

#### **1.3.1 GENERAL**

- .1 Evaluate functional and operational requirements in the existing ISC and IOGC locations, with the intent of providing direction for the design of the future co located office, and special purpose operations.
  - .1 Office function will be based on the Government of Canada Workplace Fit-Up Standards and the GC workplace DESIGN documents.



### 1.3.2 INDIGENOUS ENGAGEMENT CONSIDERATIONS

#### .1 Indigenous Knowledge (IK) Design Lead

Local indigenous people are key partners in this project. They represent the end user and also have key interest in the function and performance of the end product, from an operational perspective, as well as being a part of their community. The consultant must include an IK Design Lead who will be responsible for soliciting and managing Indigenous collaboration and feedback, including: identification of applicable local community(ies) to be consulted, inviting select members of the local community(ies) to form an Indigenous Advisory Group for the project, and working with the Community(ies) and their members. The solicitation and management of Indigenous collaboration and feedback, including Indigenous Knowledge (IK), will be facilitated through the consultant.

- .1 The IK Design Lead will ensure that Indigenous Knowledge and feedback from the local Indigenous people are appropriately represented along with other design inputs.
- .2 The IK Design Lead will work directly with Tsuut'ina Nation and community organizations' offices and personnel to receive input to support decision-making.
- .3 The IK Design Lead will identify and engage with local Indigenous group(s), as determined to be an appropriate representation of local communities, to form an Indigenous Advisory Group and ensure input.
- .4 The IK Design Lead will maintain a continuous working relationship with the Local Indigenous Advisors, or appointed representatives, as applicable.
- .5 The IK Design Lead will organize and host one (1) in-person Community Engagement Session.
- .6 The IK Design Lead must ensure that all project deliverables include applicable knowledge and feedback gathered from Local Indigenous people, and validate its representation.
- .7 The IK Design Lead will identify opportunities for building long-term relationships with the local Indigenous people including on-going use of the space by local youth, elders and community groups in the long-term.

### 1.3.3 LOCAL INDIGENOUS ADVISORS (LIAs)

- .1 In addition to working with Tsuut'ina Nation and community organizations' offices and personnel, the consultant team must plan to include a minimum of 3 LIA persons as may be identified by the local Indigenous community(ies), to form a project-specific Indigenous Advisory Group (IAG).
  - .1 The LIAs will have specific local knowledge of the area where the office is intended to be located and have a keen interest in collaborating with the consultant to ensure the success of the



project. They will be representative community members or elders and will provide the project with their perspective from the community.

- .2 The LIAs will be regularly engaged as a core member of the consulting team throughout the project, and will be invited to all regularly scheduled project meetings.
- .3 The LIAs will represent the consultant team as a continuous presence in the Tsuut'ina area and will be available to assist with design input as well as collection of field data.
- .4 The LIAs will contribute toward discussions for the community engagement session.
- .5 While the LIA is not specifically charged with soliciting feedback from the community, any feedback or questions received by the LIA from fellow community members will be shared with the IK Design Lead. The consultant team will be obligated to follow applicable Indigenous Government protocols pertaining to the handling and treatment of Indigenous Knowledge.

#### **1.3.4 FUNCTIONAL PROGRAM WORK**

- .1 Provide a qualitative (functional) and quantitative (net area and gross area) description of all required spaces to support the following functional areas:
  - .1 Office and support space for 121 FTEs;
    - .1 1562 m<sup>2</sup>u.
  - .2 Special Purpose Space
    - .1 ISC (230m<sup>2</sup>)
      - .1 Cultural centre (size tbd)
      - .2 Universal Washroom (Gender neutral)
      - .3 Filing room with ability to accommodate 5' long plotter table.
    - .2 IOGC (362.3m<sup>2</sup>)
      - .1 Inside Storage/Records (18m<sup>2</sup>)
      - .2 Cultural/National Heritage/Translation/Media Room (proposed Ceremony Room) (165m<sup>2</sup>)
      - .3 Inside Storage/Records Mailroom (113.2m<sup>2</sup>)
      - .4 Computer (30 .8m<sup>2</sup>)
      - .5 Library /Resource Centre (35.2m<sup>2</sup>)
    - .3 Tsuut'ina Community Use Space (size tbd)
      - .1 Indigenous Community Use Room (size tbd)
  - .2 Additional Functional Requirements.
    - .1 Security:
      - .1 Perimeter doors require proximity card readers, electric strikes and intrusion alarms;
      - .2 Street level windows required intrusion and glass-break in the area of the windows;



- .3 Library /Resource Centre – loading tbd
- .4 Universal washroom based on CSA B651 2018 and with signage for gender neutral use.
- .2 Mechanical:
  - .1 Confirm requirements of Culture Centre for HVAC after hours for ceremonies and smudging.
- .3 Electrical
  - .1 Lighting ambiance for cultural activities in the ceremony special purpose room.

### **1.3.5 OFFICE FURNITURE SUPPORT WORK**

- .1 Assess all existing furniture, equipment and appliances suitable for reuse.
- .2 Provide a complete inventory of all furniture, equipment, and appliances suitable for reuse as per the assessment.

## **1.4 OBJECTIVES**

### **1.4.1 GENERAL GOALS**

- .1 Provide functional programming activities and deliverables that:
  - .1 Meet the indicated functional and operational requirements of ISC and IOGC;
  - .2 Identify partnerships with Indigenous community groups for co-use of cultural space(s) aimed at building long-term relationships between the Government of Canada and local Community groups.
  - .3 Consider, to the greatest extent possible, the changing needs and anticipated future uses of the User Departments and identified Community groups;
  - .4 Describe a healthy and safe working environment meeting or exceeding all codes for fire, health and life safety, including the Canada Labour Code;
  - .5 Fully support optimum facility activities and programs;
  - .6 Describe efficient and productive accommodations with planning configurations and workspaces that are flexible, functional, responsive and efficient in keeping with current PWGSC, Treasury Board, Health Canada and User Department standards;
  - .7 Describe fit-up related requirements for architectural, structural, mechanical, electrical, audio-visual, IT, furniture, equipment and security design.
- .2 Review trends and identify, through benchmarking, requirements necessary to provide creative, functional and cost effective Work solutions.

### **1.4.2 PROJECT DELIVERY**

- .1 Obtain written authorization from the Departmental Representative before proceeding from one project milestone to another.
- .2 Coordinate all services with the Departmental Representative.





- .3 Establish a cohesive functional partnership and open communication between all members of the project delivery team throughout the project.
- .4 Identify local Indigenous community groups and initiate meaningful engagement to establish a project-specific Indigenous Advisory Group in support of an inclusive design process that fosters on-going community relationships within the future space.
- .5 Maintain continuity of key personnel and a dedicated working team for the life of the project.

## **1.5 SUMMARY OF SERVICES AND SPECIALTIES**

### **1.5.1 GENERAL SERVICES**

- .1 Provide a fixed fee for all consulting services required to complete the scope of work required for this project.
- .2 Provide a full Consultant Team including the following specialist services:
  - .1 Professional Architectural Services including;
    - .1 Professional Interior Designer with expertise in systems furniture,
    - .2 Functional programming specialist (may also be facilitator noted below),
    - .3 Facilitator and project manager of the Consultant Team (fully experienced in facilitating User Department workshops).
  - .2 Indigenous Knowledge (IK) Design Lead;
  - .3 Furniture inventory specialist;
  - .4 Cost Estimating specialist;
    - .1 Certified by the Canadian Institute of Quantity Surveyors.

## **1.6 SCHEDULE**

### **1.6.1 GENERAL**

- .1 Deliver the project to be ready for occupancy in accordance with the project milestone listing identified below.
- .2 Prepare a Project Schedule in accordance with the milestone list.
  - .1 Expedite completion of the final Functional Program Report where possible.



## 1.6.2 ANTICIPATED MILESTONE DATES

Project Phase	Milestone Completion Date	Number of Weeks
Consultant Contract Award	July 11 <sup>th</sup> , 2022	
Establish Indigenous Advisory Group and initiate Indigenous Community Engagement (one (1) Community Engagement Session)	TBD	4 weeks
Functional Program Workshops with Indigenous Advisory Group (IAG)	TBD	4 weeks
Early Draft Report & Presentation	September 2022	
Draft Functional Program Report	TBD	4 weeks
PWGSC Quality Assurance Review	TBD	2 weeks
Final Functional Program Report	TBD	4 weeks
PWGSC Quality Assurance Review	TBD	2 weeks
Furniture Assessment	TBD	2 weeks
PWGSC Quality Assurance Review	TBD	2 weeks
Furniture Inventory	TBD	2 weeks
PWGSC Quality Assurance Review	TBD	2 weeks

## 1.7 COST

### 1.7.1 ESTIMATED CONSTRUCTION COST

- .1 The Estimated Construction Cost is anticipated at this time to be \$3,800,000.
- .1 The Estimated Construction Cost does not include project management fees, administrative costs, Consultant fees, risk allowance, escalation or GST and is in 'Budget-Year (Current)' dollars.

## 1.8 EXISTING DOCUMENTATION

### 1.8.1 AVAILABLE FOR THE CONSULTANT

- .1 Interior drawings of existing locations are available in PDF format.
  - .1 Tenant floor plans C1, 02 and 03
- .2 User Department standards.
- .3 Government of Canada Workplace Fit-Up Standards and the GC workplace DESIGN documents.

### 1.8.2 DISCLAIMER

- .1 Reference information will be available in the language in which it is written.
- .2 The documentation may be unreliable and is offered, "as is" for the information of the Consultant.



## **1.9 CODES, ACTS, STANDARDS, REGULATIONS**

### **1.9.1 GENERAL**

- .1 In addition to Provincial and Municipal Acts, Codes, By-laws and Regulations appropriate to the area of concern, the following Codes, Acts, Standards and Guidelines are applicable to this project (in the event of a conflict between codes, the more stringent shall take precedence):
  - .1 NRC National Building Code of Canada 2015;
  - .2 NRC National Fire Code of Canada 2015;
  - .3 NRC National Plumbing Code of Canada 2015;
  - .4 CSA/B561-18, Accessible Design for the Built Environment;
  - .5 The Canada Labour Code (CLC);
  - .6 The Canada Occupational Health and Safety Regulations;
  - .7 Government of Canada Workplace Fit-Up Standards and the GC workplace DESIGN documents;



## **2 REQUIRED SERVICES**

### **2.1 GENERAL REQUIREMENTS**

#### **2.1.1 SERVICES**

- .1 Functional Program.
- .2 Indigenous Community Engagement.
- .3 Office Furniture Support.

### **2.2 PROJECT REVIEW AND ACCEPTANCE**

#### **2.2.1 GENERAL**

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

#### **2.2.2 QUALITY ASSURANCE REVIEWS, ACCEPTANCE AND PRESENTATIONS**

- .1 Each submission at each Project Milestone is subject to reviews by the Departmental Representative, the ISC and IOGC User Departments, PWGSC Architecture and Engineering Centre of Expertise (AECOE) and other project stakeholders.
- .2 At each submission:
  - .1 Review submissions to be posted on AutoDesk BIM 360 Docs in searchable PDF format;
  - .2 Expected turnaround time for each review is ten (10) working days;
  - .3 The Consultant Team will receive review comments in the form of an editable MS Word document or MS Excel document;
    - .1 Provide a single coordinated written response within five (5) working days of receiving review comments.

### **2.3 FUNCTIONAL PROGRAM SERVICE**

#### **2.3.1 GENERAL**

- .1 Participate in meetings, prepare minutes and decision logs.
- .2 Provide a qualitative (functional) and quantitative (net area and gross area) description of all required spaces to support the office and special purpose space functional areas.
- .3 Facilitate workshops with the User Department and Indigenous Advisory Group.

#### **2.3.2 SCOPE AND ACTIVITIES**

- .1 Identify and initiate contact with applicable local indigenous communities, and initiate building of relationships to establish an Indigenous Advisory Group for the project.
- .2 On the basis of the Departmental Representative's information, the Government of Canada Workplace Fit-Up Standards and the GC workplace DESIGN documents, meet with the User Department representatives and established Indigenous Advisory Group to develop the functional requirements.



- .3 Prepare agenda and a questionnaire to facilitate on-site assessments of the two User Department's and identified local Indigenous Groups' functional space and operational/service requirements:
  - .1 Develop and document for each User Department approval the relationship and adjacencies of all functional areas.
- .4 Prepare a complete list of all functional needs clearly describing all space requirements including:
  - .1 Useable description of work activity within each space.
  - .2 Identified connections between the programmed space, local Indigenous groups and the lands.
  - .3 area requirements for each individual functional space type;
  - .4 Total useable area requirements for the office and special purpose space areas;
  - .5 Gross area summary needed to accommodate the functional program;
- .5 Confirm and compare space allocations against the User Department organizational chart if available.
- .6 Provide a summary of each functional space type including:
  - .1 Plan diagram (including equipment and furnishings);
  - .2 Common spaces;
  - .3 Equipment spaces;
  - .4 Support spaces, and;
  - .5 Special Purpose spaces required by the User Departments and identified local Indigenous Groups.
- .7 Provide a summary of the number (and type) of occupants for each functional space.
- .8 Provide a description of specific technical requirements indicating general Architectural, Structural, Mechanical and Electrical systems applicable to each functional area and/or each space type including:
  - .1 Required operational and service infrastructure;
    - .1 Collaborate with identified lead User Department representative, the Departmental Representative, and the established Indigenous Advisory Group to obtain professional and technical input,
    - .2 Identify all required special conditions to support the project program and on-going community use of the space,
    - .3 Identify all security, acoustic and special fire separation requirements, and;
    - .4 Identify any potential Occupational Health and Safety requirements.
  - .2 A review and definition of all audio-visual and IT requirements;
  - .3 Structural floor and overhead loading requirements to support library functions.
- .9 Identify major equipment and casework requirements for each functional area/space.



- .10 Review and define the User Department's storage requirements:
  - .1 Size, locations, furnishings/equipment and security.
- .11 Prepare a regulatory analysis. Include:
  - .1 Applicable Codes, Standards and Regulations.
- .12 Prepare an estimate of the improvement costs:
  - .1 Prepare, based on the Functional Program, a Budget summary of design items/components and estimated cost breakdown, and;
  - .2 Include a Class 'D' cost estimate in the compiled Functional Program document.
    - .1 CSC/CSI UniFormat™ 2010;
    - .2 Indicative (+/- 20%-25%), UniFormat™ Level 2 is required.
- .13 Based upon the approved draft Functional Program, develop, for Acceptance by the Departmental Representative and each User Department, the following:
  - .1 Spatial relationship diagrams to indicate adjacency requirements between each of the spaces, groups of spaces, indigenous community and land, and;
  - .2 Block plans:
    - .1 Showing the location of each functional component, and;
    - .2 To determine reasonable net to gross area ratios.

### **2.3.3 INDIGENOUS ENGAGEMENT**

- .1 Identify applicable local Indigenous groups and appoint selected Local Indigenous Advisors (LIA) to form the project-specific Indigenous Advisory Group to be engaged in the project. Multi-generational participation is desired; and,
  - .1 Renumeration related to financial agreements for Local Indigenous Advisors (LIA) will not form part of this contract. ISC and IOGC to provide compensation separately.
- .2 Arrange and facilitate one (1) Indigenous engagement session shortly after appointment of the Consultant team, aiming to inform members of the local community about the project and receive community input to support decision-making.
  - .1 Identify opportunities to support community-based learning opportunities related to local indigenous history and language that foster the long-term use of the space by the community in the long-term.
  - .2 Participate in an Indigenous community tour with LIA, and engage in sharing of local Indigenous Knowledge (IK) with local community members and elders to facilitate place-based thinking at the outset of the project.

### **2.3.4 FUNCTIONAL PROGRAM WORKSHOPS**

- .1 Arrange and facilitate up to three (3) functional programming workshops shortly after appointment of the Consultant Team;
  - .1 Allow for one (2) office space workshops, one each for ISC and IOGC, and up to two (1) full day combined workshop with the



- Departmental Representative, User Department representatives from both ISC, IOGC and the Indigenous Advisory Group (IAG);
- .2 Introduce the Functional Program process, stages and required arrangements and authorities, and;
  - .2 Participate in a site tour to see both offices to understand the occupancy and operational requirements, office and support areas, Special Purpose Space needs and layouts, and project related requirements. Arrange and facilitate follow up sessions during Functional Program Services as required.

### **2.3.5 DELIVERABLES**

- .1 Indigenous Engagement Report documenting the Indigenous Engagement process, inter-cultural relationship-building outcomes, and identified opportunities for long-term use of the space by community groups that supports community-based learning related to local indigenous history and language.
- .2 Early Draft Functional Program Report (include footprint size and Class D Cost Estimate for fit-up).
  - .1 Deliver presentation to PSPC ISC, IOGC, IAG and other stakeholder groups.
    - .1 Summarize project findings based on discussions with ISC, IOGC and Tsuut'ina community groups, project objectives/specifics.
    - .2 Advise of additional information required to complete the functional program
    - .3 Identify engagement activities/ client consultation/ site and user department information required to complete the Project.
  - .3 Draft Functional Program Report documenting the Functional Program Scope and Activities.
    - .1 Provide one (1) electronic searchable PDF copy on the BIM 360 site.
  - .4 Final Functional Program Report documenting the Functional Program Scope and Activities.
    - .1 Revise as required.
    - .2 Provide one (1) electronic searchable PDF copy on the BIM 360 site.

## **2.4 OFFICE FURNITURE SUPPORT SERVICE**

### **2.4.1 GENERAL**

- .1 Provide the Office Furniture Support Service reports identified in this section in compliance with the Government of Canada Workplace Fit-Up Standards and GC workplace DESIGN documents.

### **2.4.2 REPORTS**

- .1 Existing Furniture Assessment
  - .1 Prepare an on-site furniture assessment including:
    - .1 Manufacture, series, model type;



- .2 Age of furniture and applicable warranties;
- .3 Location of existing furniture;
- .4 The technical nature, condition, aesthetic, ability to procure additional parts and services for the existing furniture and ease of facility management as it pertains to the health, safety, and welfare of the end-users;
- .5 Recommendations and percentage of existing furniture for reuse in "as-is" condition, refurbished for reuse, slated for surplus through Crown Assets, slated for recycling/landfill or a combination thereof;
  - .1 Suitability of the existing furniture to be incorporated into a new floor plan, should consider the sizes of the components (e.g. height of system panels, adjustability of work surfaces, reduction in paper storage, etc.).
- .6 Assess equipment and appliances suitable for reuse;
  - .1 Include in the Functional Program.
- .7 Cost Benefit Analysis;
  - .1 Furniture options;
    - .1 Cost estimates for furniture options;
    - .2 Basis of Estimate (BOE) narrative.
  - .2 Justifications and recommendations for a furniture reuse strategy based on best value;
    - .1 Analyse and compare cost estimates for furniture options,
    - .2 Non-monetary costs and considerations (e.g. environmental impact, disruption to operations, etc.).
- .2 Existing Furniture Inventory for Reuse
  - .1 Provide a complete inventory of all screens/partitions, workstations and components, freestanding furniture, equipment, and appliances suitable for the project.
  - .2 Include quantity, size and details unique to the project.
  - .3 Based upon the Functional Program provide a spreadsheet showing all existing furniture, equipment and appliances to be reused, repurposed, reconfigured and/or stored as surplus as part of the project.
  - .4 Update the report throughout the project as required.





## **3 PROJECT ADMINISTRATION**

### **3.1 GENERAL REQUIREMENTS**

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

### **3.2 LANGUAGE**

- .1 Documents must be prepared in English.
- .2 Indigenous Engagement Report must be prepared in English and Sarcee.

### **3.3 MEDIA**

- .1 The Consultant shall not respond to any media inquiry.
- .2 Direct all media requests to the Departmental Representative.

### **3.4 PROJECT MANAGEMENT**

#### **3.4.1 GENERAL**

- .1 PWGSC administers the project on behalf of Canada and exercises continual control over the project during all phases of the Work.
- .2 The PWGSC project management team, the Consultant Team and the User Department teams are to work cooperatively at every stage in order to assure a successful project.

### **3.5 LINES OF COMMUNICATION**

- .1 All communications will be through the Departmental Representative, unless directed otherwise.
  - .1 This includes formal contact between the Consultant Team, the PWGSC Project Team, User Department and the Indigenous Advisory Group.
- .2 Direct communication between members of the PWGSC Project Team on routine matters may be required for resolution of technical issues.
  - .1 However, this shall not alter project scope, Budget or schedules, unless confirmed in writing by the Departmental Representative.

### **3.6 MEETINGS**

#### **3.6.1 GENERAL**

- .1 The Departmental Representative will arrange meetings throughout the project, with representatives from:
  - .1 The Indigenous Advisory Group;
  - .2 The User Department;
  - .3 PWGSC, and;
  - .4 The Consultant Team.
- .2 Project Start-up Meeting:
  - .1 Shall be arranged and facilitated by the Departmental Representative, and;



- .2 Includes the PWGSC AECOE Design Manager, PWGSC AECOE Furniture Specialist, User Department Representatives and the Consultant Team.
- .3 Bi-weekly meetings with PWGSC, User Department, Indigenous Advisory Group and the Consultant Team will normally be held via teleconference.
- .4 Due to COVID restrictions, the Functional Program workshops (3 in total) may be held via video conference.
- .5 Indigenous Engagement Session is to be held in-person.

### **3.7 CONSULTANT RESPONSIBILITIES**

#### **3.7.1 GENERAL**

- .1 The Consultant Team includes the Consultant's staff, sub-consultants and specialists.
  - .1 Consultant Team must be registered with the Indigenous Services Canada Business Inventory.
  - .2 This team must maintain the same, or better, level of expertise, as presented in their proposal, for the duration of the project;
  - .3 The team must include qualified registered architectural and engineering professionals with extensive relevant experience and who are capable of providing all required services;
    - .1 Professional registrations / certifications must remain current.
  - .4 Team members may be qualified to provide services in more than one discipline, and;
  - .5 The Consultant may expand the team to include additional disciplines.
- .2 The Consultant is responsible for:
  - .1 Obtaining Departmental Representative Acceptance for each project phase before proceeding to the next phase;
  - .2 Accurately communicating design, Budget, and scheduling issues to staff, sub-consultants and specialists;
  - .3 Developing and coordinating a comprehensive quality assurance process to ensure that submissions are accurate, complete and meet TOR requirements; and
  - .4 Fostering the building of relationships between the project team and local Indigenous community(ies).
- .3 Attend meetings.
- .4 Record the issues and decisions.
- .5 Prepare and distribute minutes within two (2) working days of the meeting.
- .6 Ensure sub-consultants attend all required meetings.

### **3.8 PWGSC RESPONSIBILITIES**

#### **3.8.1 ADMINISTRATION**

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



- .2 The following administrative requirements apply during all phases of the project delivery.

### **3.8.2 REVIEWS**

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

### **3.8.3 ACCEPTANCE**

- .1 PWGSC Acceptance of submissions from the Consultant simply indicates that - based on a general review - the material complies with governmental objectives and practices, and meets overall project objectives.
- .2 Acceptance does not relieve the Consultant of professional responsibility for the Work or compliance with the contract.

### **3.8.4 PWGSC PROJECT MANAGEMENT**

- .1 The Project Manager assigned to the project is the Departmental Representative.
- .2 The Departmental Representative is directly responsible for:
  - .1 The progress and administration of the project, on behalf of PWGSC;
  - .2 Day-to-day project management and is the Consultant's single point of contact for project direction, and;
  - .3 Providing authorizations to the Consultant on various tasks throughout the project.
- .3 Unless directed otherwise by the Departmental Representative, the Consultant obtains all Federal approvals necessary for the Work.

### **3.8.5 PWGSC ARCHITECTURE, ENGINEERING CENTRE OF EXPERTISE (AECOE) AND HERITAGE CONSERVATION WESTERN (HCW)**

- .1 Provides advisory services and Quality Assurance Reviews of Consultant deliverables.
- .2 Participates regularly in design and construction Project Milestones and may attend meetings as and when required.
- .3 Provides a Design Manager for the project who will coordinate the services of AECOE.

## **3.9 USER DEPARTMENT RESPONSIBILITIES**

### **3.9.1 USER DEPARTMENT PROJECT LEADER**

- .1 Is accountable for the expenditure of public funds and delivery of the project in accordance with the terms accepted by the Treasury Board.
- .2 Reports to the senior User Department executive management.
- .3 Will play several critical roles for the successful implementation of the project, including:
  - .1 Coordination of the quality, timing and completeness of information and decisions relating to issues related to the functional performance of the facility.



### 3.10 TECHNICAL REPORTS

- .1 Technical Reports are official government documents, which are used to support an application for approval or to obtain authorization or Acceptance. Technical Reports must:
  - .1 Be complete, clear and professional in appearance and organization, with proper reference to related parts and contents in the report;
  - .2 Clearly outline the intent, objectives, process, results and recommendations;
  - .3 Present the flow of information and conclusions in a logical, easy to follow sequence;
  - .4 Be in written narrative, graphic, model (traditional and/or computer generated), and photographic format, which can be web enabled;
  - .5 Have all pages are numbered in sequence, and;
  - .6 Be printed double-sided, if hard copies are produced.
- .2 Standard practice for the organization of technical reports include:
  - .1 A cover page, clearly indicating the nature of the report, the date, the PWGSC project number and who prepared the report;
  - .2 A Table of Contents;
  - .3 An Executive Summary;
    - .1 A true condensed version of the report following the identical structure, including only key points and results/recommendations requiring review and/or approval;
  - .4 The body of the report is to be structured such that the reader can easily review the document and locate, respond to and/or reference related information contained elsewhere in the report easily;
  - .5 Appendices are to be used for lengthy segments of the report, supplementary and supporting information and/or for separate related documents.
- .3 The report content must:
  - .1 Use a proper numbering system (preferably legal numbering), for ease of reference and cross-reference;
    - .1 The use of 'bullet points' are to be avoided.
  - .2 Use proper grammar, including using complete sentences, for clarity, to avoid ambiguity and facilitate easy translation into French, if required;
    - .1 The use of undefined technical terms, industry jargon and cryptic phrases are to be avoided.
  - .3 Be written as efficiently as possible, with only essential information included in the body of the report and supporting information in an appendix if needed.



## 4 DEFINITIONS

### 4.1 PURPOSE

#### 4.1.1 DOCUMENT DEFINITIONS:

- .1 Definition of words and phrases in the Terms of Reference (TOR) to:
  - .1 Expand the detail associated with the services and deliverables addressed in the above Documents, and;
  - .2 Provide a clear understanding of the project scope, procedures, and quality performance requirements.

### 4.2 DEFINITIONS

#### 4.2.1 ACCEPTANCE

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

#### 4.2.2 BASE BUILDING

- .1 As per Government of Canada Workplace Fit-Up standards.

#### 4.2.3 BUDGET

- .1 Developed using Cost Estimates and the Project Schedule.
- .2 Provides a view of how much the project is estimated to cost both in total and periodic terms.
- .3 Determines the cost performance baseline for use in cost management variance analysis such as, determining earned performance value.
- .4 Is aligned with funding limits to confirm funding availability/appropriation.

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

- .1 Her Majesty the Queen in right of Canada.

#### 4.2.5 COLLABORATIVE PROJECT DELIVERY

- .1 The Collaborative Project Delivery approach promotes and facilitates knowledge collaboration between design and construction professionals and subject matter experts to create optimal design and construction solutions and methodologies in order to achieve an appropriate, timely and fiscally responsible Quality project delivery.
  - .1 Recognizes that project success is tied to all Project Team members' success in the integrated process.
    - .1 The Collaborative Project Delivery process starts at the Pre-Design with Departmental Representative as Lead Partnering Session and the Consultant, as Lead, project start-up meeting early in Schematic Design.
      - .1 Collaborative Project Delivery is an interactive process which continues throughout the project life cycle.
  - .2 Joint Project Team goals include:



- .1 Ownership and focus on Quality including, Owner Project Requirements (OPR), Basis of Design (BOD) as well as Budget and schedule performance;
- .2 Focus on optimizing the design and construction as a whole to fulfill the PWGSC Quality expectations;
- .3 Mutual support for the project procedures and management;
- .4 Leveraging Value Engineering, Life Cycle Costing and commissioning skills, and;
- .5 Creation of an innovative learning environment.

#### **4.2.6 CONSULTANT**

- .1 Architectural/Interior Design/Engineering firm acting in the capacity of Prime Consultant and professional of record for the provision of services described in the TOR.
- .1 The Consultant manages and coordinates the Consultant Team (refer to Definition).

#### **4.2.7 CONSULTANT TEAM**

- .1 The Consultant (architectural/interior design/engineering firm and Prime Consultant) and their sub-consultants including professionals and advisors with whom PWGSC has contracted to provide other services described in this TOR.

#### **4.2.8 DEPARTMENTAL REPRESENTATIVE (DR)**

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

#### **4.2.9 FIT-UP STANDARDS**

- .1 Space and cost (funding) allocation and workplace configuration and furnishing as per Framework for Office Accommodation and Accommodation Services – Government of Canada Workplace Fit-Up Standards and the GCworkplace DESIGN documents.
- .1 Departmental Representative will provide an electronic and/or hard copy.

#### **4.2.10 INDIGENOUS KNOWLEDGE (IK)**

- .1 The beliefs and knowledge about the Indigenous way of life and observations about the environment, which has been transmitted from generation to generation by oral or written communication;
- .2 Cultural past, present and future knowledge and land use experience and information over which the Indigenous Government and its members have collective rights include the right to teach and pass on knowledge and which includes: traditional knowledge, knowledge systems, relations, innovations, stories and cultural expressions, passed from generation to generation, and are used to maintain the Government's culture and way of life, and are generally regarded as pertaining to the Government and the members and/or the traditional territory, and may be constantly evolving in response to a changing environment.



- .3 Categories of IK include: technical knowledge; environmental and ecological knowledge, scientific knowledge; and knowledge relating to biodiversity; medicinal knowledge, including related medicines and remedies; knowledge and oral transmission of history, literature, customary law and genealogy; expressions of legends, stories, history and other cultural knowledge and material in the form of music, dance, song, handicrafts, designs, and artwork; languages, such as names, geographical indications and symbols; and moveable cultural properties; and
- .4 IK which is learned and maintained through the practice of cultural pursuits and activities, all contributing to individual and Government identity.

#### **4.2.11 PROJECT MANAGEMENT PLAN (PMP)**

- .1 Live project interface document throughout the project life cycle.
  - .1 The Consultant designates a Project Manager from the Consultant Team to interface with the Departmental Representative, stakeholder and Consultant Team.
  - .2 Project Management progress is assessed against the PMP.
- .2 The PMP is structured to reflect project phases and respective Project Team's interdisciplinary service category required Deliverables – actual or virtual.
- .3 Establishes project Quality Control, set up with:
  - .1 Task management, processes, and procedures;
  - .2 Monitoring systems and reporting for early identification and registration of deviations and/or trends related to Quality Matrixes.
- .4 Creates an opportunity to monitor other Project Team members' management processes and procedures including:
  - .1 Departmental Representative's PMP.
- .5 PMP may include:
  - .1 High level, total project depiction/documentation including;
    - .1 Project quality and current performance status in comparison to the start of project including major changes;
    - .2 Risk Management: risks mitigated and risks remaining towards project completion;
    - .3 Issues/resolution log management: issues resolved and issues remaining towards forecasted project completion.
  - .2 Resource management: people, tools and others;
  - .3 Communication protocol: coordination, leadership, communication lines/channels, communication type, and reporting approach;
  - .4 Claims management: towards equitable resolutions and minimal disruptions;
  - .5 Scope and change management: achieving project delivery and facility feature requirements;





- .6 Time management: master and detailed design/construction activities milestone deliverable schedules – updated to include slippage, recovery and claims avoidance;
- .7 Budget and cost management: monitoring, tracking and projecting;
- .8 Risk Management: methods of identifying and evaluating risk including risk indexes (probability/consequence), mitigation actions, progress tracking and contingency planning;
- .9 Quality management: quality design and delivery;
- .10 Procurement management: means of delivery;
- .11 Issues/resolution management: log development and maintenance;
- .12 Construction Delivery Close Out (as per Division 01) Project Management Control System; and
- .13 Meetings: preconstruction, progress and special meetings.

#### **4.2.12 PROJECT TEAM**

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

#### **4.2.13 QUALITY**

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

#### **4.2.14 QUALITY ASSURANCE (QA) REVIEWS**

- .1 PWGSC QA Reviews are an advisory service to the Project Team and stakeholders where respective submission/deliverable accountabilities remain in effect as per contractual conditions or other forms of commitment.
  - .1 The Consultant remains professionally accountable for the design validation and verification required of the Project Milestone submissions during the project life cycle.
- .2 QA Reviews, supported by commentary, conclude with a risk assessment associated with Quality of design and documentation deliverables, and include:
  - .1 Parameters to confirm at the onset of a review whether deliverables are appropriately scoped and detailed with respect to current Project Milestones or phase/progressive submissions.
- .3 QA Reviews focus on Quality Indicators (QI) parameters associated with Design Quality Indicators (DQI) and Quality Deliverable Indicators (QDI).
- .4 Design Quality Indicators (DQI):
  - .1 3 Aspects of DQI:





- .1 Functionality – design utility;
- .2 Build Quality – design performance, and;
- .3 Impact – project contextual interactivity (such as cultural, market, environmental conditions/factors):
  - .1 Project impact on context, and vice versa;
  - .2 Context impact on project.
- .2 Each DQI Aspect is considered against Good Design Protocols, such as;
  - .1 Creativity and Technical Competence;
  - .2 Functional Suitability;
  - .3 Whole-of-Life Performance;
  - .4 Health, Safety and Security;
  - .5 Inspiring and Attractive;
  - .6 Appropriate Innovation, and;
  - .7 Sustainable and Enduring.
- .3 As each DQI Aspect is considered against Good Design Protocols, each Aspect is also assessed against the same Characteristics such as:
  - .1 Conceptual Integrity;
  - .2 Functionality;
  - .3 Operability;
  - .4 Constructability, and;
  - .5 Claims Prevention.
- .5 Quality Deliverable Indicators (QDI):
  - .1 Focus on documentation delivery.
    - .1 Submitted documentation is assessed against 6 characteristics:
      - .1 Clarity;
      - .2 Completeness;
      - .3 Compliance;
      - .4 Consistency;
      - .5 Correctness, and;
      - .6 Decision Traceability.

#### **4.2.15 RISK MANAGEMENT PLAN**

- .1 Departmental Representative (DR) initiates and maintains a PWGSC RM Program.
- .2 The objective of the Plan is to develop a methodology to improve risk management by:
  - .1 Establishing risk policies to confirm acceptable levels of non-compliance as per DR Risk Management Plan;
  - .2 Focusing on external and internal risk parameters, and;
  - .3 Articulating an approach/framework to identifying risk and its impact in advance and managing the risk with the goal of reducing, transferring or avoiding risk where appropriate.



- .3 Program and Plans are collaboratively monitored and amendments are proposed to the DR by the Project Team as required for an effective project delivery.

#### **4.2.16 UNIFORMAT™**

- .1 A uniform, hierarchical classification structure of construction systems and assemblies.
  - .1 Current version – CSI/CSC Uniformat™, 2010 edition.
- .2 UniFormat™ organizational structure also guides the development and delivery of the cost estimate.

#### **4.2.17 WORK**

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

#### **4.2.18 WORK BREAKDOWN STRUCTURE (WBS)**

- .1 Integral to schedules and project execution plans.

#### **4.2.19 WORKPLACE**

- .1 Workplace (the Workplace), concept is space being allocated based on the functional requirements of workers and the amount of time spent in the workplace.
- .2 Workplace optimizes office accommodation while supporting public servants in their work, encouraging a collaborative environment and providing the latest technologies.

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