

APPENDIX B  
Evaluation Criteria

## 1 Instructions, clarification, and evaluation procedures

### 1.1 Requirement

Award one or more Call-up Standing Offers to vendors with specification writers who will perform master specification writing services.

### 1.2 Evaluation procedure

Each proposal will be evaluated and scored in accordance with the evaluation criteria as detailed herein. It is imperative that these criteria be addressed in sufficient depth in the proposal to fully describe the Bidder's response.

#### 1.2.1 Step 1: Evaluation against Corporate Mandatory Criteria and Technical Mandatory Criteria

Proposals will be evaluated to determine if all mandatory requirements detailed in the "Mandatory Criteria" have been met. Only those proposals meeting ALL mandatory requirements will then be evaluated in accordance with Step 2.

#### 1.2.2 Step 2: Method/Basis of Selection for a Call-Up Against a Standing Offer

All approved Vendors that self-identify a competent level experience in a particular topic (see Appendix A") will be shortlisted for a Call-Up Against a Standing Offer for that particular topic.

#### 1.2.3 Step 3: Shortlist of Vendors

Vendors that are shortlisted may respond to a Call-Up Against a Standing Offer, but Vendors are not required to respond to all Call-Ups Against a Standing Offer. Vendors must only respond if they will perform the services and achieve the deadline identified in a Call-Ups Against a Standing Offer.

#### 1.2.4 Step 4: Recommendation for contract award

For each Call-Up Against a Standing Offer, the compliant bidder with the lowest price for that Call-Up Against a Standing Offer will be recommended for issuance of a Contract.

### 1.3 Customer Reference Contact Information

The Bidder must submit two (2) separate customer reference letters who can speak to two (2) different projects and must each confirm the facts identified in the Bidder's submission. For each customer reference letter the Bidder must include the name, the telephone number, and email address for the customer reference contact person. Bidders are also requested to include the title of the contact person. If there is a conflict between the information provided by the customer reference and the bid submission, the information provided by the customer reference will be evaluated instead of the information in the bid.

### 1.4 Corporate Profile

The Bidder is requested to provide a corporate profile, which should include an overview of the Bidder and any subcontractors, and/or authorized agents of the Bidder that would be involved in the performance of the Work on the Bidder's behalf. The Bidder is requested to provide a brief description of corporate structure, years in business, business activities, major customers, number of employees, number of specification writers, and a list of the Canadian provinces and territories where their constructed projects are located. Submitting a corporate profile is applicable to all businesses structures (corporation, partnership, or sole proprietor). This information is requested for information purposes only and will not be evaluated.

### 1.5 Definitions

**Project Specification:** Documents that communicate the written requirements of a project's design and administrative requirements of a building or infrastructure in a construction contract.

**Master Specifications:** Refers to template documents for a specification writer to efficiently use when preparing a project specification. They standardize the use of products, materials, and processes in a consistent format; each Section coordinated with the others. They generally follow the recommendations of MasterFormat and SectionFormat.

**Office Master Specifications:** Master specifications with content focused on a particular design professional's common project types. They are also a repository of knowledge gained from previously constructed projects. They are not commercially purchased master specifications without any further revisions by the design professional. The NMS is not an office master specification.

## 2 MANDATORY AND TECHNICAL MANDATORY EVALUATION CRITERIA

	Mandatory Criteria	Met Criteria	Cross-reference to Proposal (Bidder to insert)
MC1	<p>Methodology:</p> <p>As part of their proposal, the Bidder must include a methodology that would demonstrate their ability to effectively perform Master Specification Writing Services. It should also describe their process to ensure that all Call-Ups placed against Standing Offers are completed on time. The proposed methodology must meet expectations and address all elements identified. The Methodology must not exceed 2 pages.</p>	Yes or No	
MC2	<p>Language of Work:</p> <p>All people proposed must have the ability to communicate effectively in English, both orally and in technical writing.</p>	Yes or No	
	Technical Mandatory Criteria	Reference to Technical Proposal & Comments	
MT1	<p>The Bidder must propose a minimum of one specification writer. To qualify, each proposed specification writer must demonstrate all of the experience requirements below. Bidders must include a resume for each proposed specification writer, maximum 2 pages. Each resume must include relevant information demonstrating compliance to this technical mandatory criteria. For all specification writers proposed, education and experience must meet and address all elements identified in the evaluation criteria.</p> <ul style="list-style-type: none"> <li>• A university degree, college certificate, or diploma in architecture, engineering, building science, construction management, architectural technology, engineering technology, from a recognized Canadian Institution or if obtained outside Canada the equivalent as established by a recognized Canadian academic credentials assessment service; and</li> <li>• CSC Registered Specification Writer; or CSC Certified Specification Practitioner; or CSI Certified Construction Specifier; or completed the Construction Specifications Canada, Principles of Construction Documentation course and Specifier coursework with 10 years</li> </ul>		

	<p>specification writing experience; and</p> <ul style="list-style-type: none"> <li>• Work Experience: Comply with one or both of the following: <ul style="list-style-type: none"> <li>• Coordinated an entire project manual, written the General Requirements (Division 01), and written all Sections for one A/E/C discipline for 15 project specifications within the last 5 years for construction and/or renovation projects in Canada with a total construction value of \$8,000,000.00 minimum. As evidence of each specification writer’s work experience submit two project specifications, and identify which Sections were the responsibility of the specification writer. Submit as PDF.</li> <li>• Minimum three (3) years’ experience with the primary responsibility of creating and/or revising master specifications (designed for Canadian projects). Submit a Table of Contents of the Bidder’s office master specifications. If the company has multiple master specifications, include a separate Table of Contents for each. As evidence of each specification writer’s work experience submit two master specification Sections created by the Bidder. Submit as PDF.</li> </ul> </li> </ul>	
MT2	Bidders must submit a Specification Writer Team Experience Chart with their experience topics filled in, found in the Table in Section 3, Appendix B	

### 3 [Specification Writer Team Experience Chart](#)

Submit the following chart for the proposed Specification Writer team, and respond to each topic with either “competent” or “insufficient”. This chart will be used by the NRC as a criteria to select which Vendors will be shortlisted for a particular Call-Up against the Standing Offers. List in the chart the names of the proposed specification writer team.

Degree of team’s experience on a topic shall be defined as follows:

- Competent: Meets one or more of the following three descriptions:
  - Someone on the specification writer team has edited and coordinated at least ten master specification Sections for this topic on at least three project specifications. Someone on the specification writer team has created at least two new master specification Sections for this topic.
  - Someone on the specification writer team is recognized throughout Canada as a leader in this topic, was/is a board member of a trade association, standing committees, or authored/significantly contributed to an industry-wide guide or reference standard on this topic.
  - Someone on the specification writer team was full time author and/or maintenance of a comprehensive master specification including Sections on this topic.

- Insufficient: Specification writer team’s experience does not meet the experience requirements for Competent.

Names of Specification Writers in Proponent’s Team:	
Topic	Degree of Team’s Experience on Topic (competent or insufficient)
Division 01 – General Requirements	
Commissioning – whole building	
Commissioning – Division 22, 23, and 25	
Division 02	
Division 03	
Division 04	
Division 05	
Division 06	
Division 07	
Division 08	
Division 09	
Division 10	
Division 11	
Division 12	
Division 13	
Division 14	
Division 21	
Division 22	
Division 23	
Division 25	
Division 26	
Division 27	
Division 28	
Division 31	
Division 32	

Division 33	
Division 34 (including bridges)	
Division 35	
Division 40	
Division 41	
Division 42	
Division 43	
Division 44	
Division 46	
Division 48	
Sustainability certification (for programs available in Canada)	
Climate Resiliency	
Embodied carbon and operating carbon, Life Cycle Assessment (LCA)	
Renovation specifications	
Heritage specifications	

#### 4 DESCRIPTION OF CALL-UP FOR STANDING OFFERS

Each Call-Up for Standing Offer will describe the required specification writing services for a single topic (refer to Appendix "A"). The services will be described with a list of the required specification Sections (new NMS and/or existing NMS). Each specification Section could be identified as one or more of the following seven categories.

- Create a new low level complexity NMS construction specification Section: A work result in Division 02-48, little coordination with other technical Sections, few options to be selected for a project specification, few or simple Spec Notes, generally 4 pages or less including Spec Notes. Examples could include Section 10 51 13 – Metal Lockers.
- Create a new medium level complexity NMS construction specification Section: A work result in Division 02-48, some coordination with other technical Sections, several options to be selected for a project specification, many Spec Notes with technical content, generally 7 pages or less including Spec Notes. Example could include Section 07 42 13 – Metal Wall Panels.
- Create a new high level complexity NMS construction specification Section: A work result in Division 01; or in Division 02-48 with extensive coordination with other technical Sections, several options to be selected for a project specification, many Spec Notes with technical content, may include significant liability or risk to a party, generally 12 pages or less including Spec Notes. Examples could include Section 01 35 73 – Delegated Design Procedures.
- Revise an existing low level complexity NMS construction specification Section: A work result in Division 02-48, little coordination with other technical Sections, few options to be selected for a project specification, few or simple Spec Notes, generally 5 pages or less including Spec Notes. Example includes Section 32 15 60 - Roadway Dust Control.
- Revise an existing medium level complexity NMS construction specification Section: A work result in Division 02-48, some coordination with other technical Sections, several options to be

selected for a project specification, many Spec Notes with technical content, generally 9 pages or less including Spec Notes. Example includes Section 07 42 46 – Cementitious Wall Panels.

- Revise an existing high level complexity NMS construction specification Section: A work result in Division 01; or in Division 02-48 with extensive coordination with other technical Sections, several options to be selected for a project specification, many Spec Notes with technical content, generally 13 pages or less including Spec Notes. Examples include Section 08 44 13 - Glazed Aluminum Curtain Walls or Section 14 20 06 - Passenger Elevators.
- Revise multiple NMS specification Sections to incorporate the identified topic: Topics include Sustainability certification, Climate Resiliency, Embodied carbon and operating carbon, Life Cycle Assessment (LCA), Renovation/retrofit procedures, or Heritage conservation.