

**Return Bids to:**  
**Retourner Les Soumissions à:**  
 Natural Resources Canada / Ressources  
 naturelles Canada

**Request for Proposal (RFP)**  
**Demande de proposition (DDP)**

**Proposal To: Natural Resources Canada**  
 We hereby offer to sell to His Majesty the King in right of  
 Canada, in accordance with the terms and conditions set out  
 herein, referred to herein or attached hereto, the goods,  
 services, and construction listed herein and on any attached  
 sheets at the price(s) set out therefor.

**Comments – Commentaires**

**Issuing Office – Bureau de distribution**  
 Natural Resources Canada / Ressources  
 naturelles Canada  
 Finance and Procurement Management Branch  
 Finance and Procurement Management Branch  
 Natural Resources Canada  
 580 Booth Street  
 Ottawa, ON  
 K1A 0E4

<b>Title – Sujet</b> OCx Provider – NRCan Smart Building	
<b>Solicitation No. – No de l’invitation</b> NRCan-5000075127	<b>Date</b> 8 Août, 2023
<b>Requisition Reference No. - N° de la demande</b> 178381	
<b>Solicitation Closes – L’invitation prend fin</b> <b>at – à 2 p.m. EST</b> <b>on – le 7 Septembre, 2023</b>	
<b>Address Enquiries to: - Adresse toutes questions à:</b>  <a href="mailto:Bianca.moore@nrcan-rncan.gc.ca">Bianca.moore@nrcan-rncan.gc.ca</a>	
<b>Telephone No. – No de telephone</b>  343-543-4785	
<b>Destination – of Goods and Services:</b> <b>Destination – des biens et services:</b>  Natural Resources Canada 580 Booth St Ottawa On K1A 0E4	
<b>Security – Sécurité</b>  THERE ARE SECURITY REQUIREMENTS ASSOCIATED WITH THIS REQUIREMENT.	
<b>Vendor/Firm Name and Address</b> <b>Raison sociale et adresse du fournisseur/de l’entrepreneur</b>	
<b>Telephone No.:- No. de téléphone:</b> <b>Email – Courriel :</b>	
<b>Name and Title of person authorized to sign on behalf of Vendor/Firm (type or print)</b> <b>Nom et titre de la personne autorisée à signer au nom du fournisseur/de l’entrepreneur (taper ou écrire en caractères d’imprimerie)</b>	
<b>Signature</b>	<b>Date</b>



## TABLE OF CONTENTS

<b>PART 1 - GENERAL INFORMATION .....</b>	<b>2</b>
1.1 INTRODUCTION .....	2
1.2 SUMMARY .....	2
1.3 DEBRIEFINGS.....	2
<b>PART 2 - BIDDER INSTRUCTIONS .....</b>	<b>3</b>
2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS .....	3
2.2 SUBMISSION OF BIDS .....	3
2.3 FORMER PUBLIC SERVANT .....	4
2.4 ENQUIRIES - BID SOLICITATION .....	5
2.5 APPLICABLE LAWS .....	6
2.6 IMPROVEMENT OF REQUIREMENT DURING SOLICITATION PERIOD.....	6
2.8 BASIS FOR CANADA'S OWNERSHIP OF INTELLECTUAL PROPERTY .....	6
2.9 BID CHALLENGE AND RECOURSE MECHANISMS .....	6
<b>PART 3 - BID PREPARATION INSTRUCTIONS.....</b>	<b>8</b>
3.1 BID PREPARATION INSTRUCTIONS.....	8
<b>PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION .....</b>	<b>9</b>
4.1 EVALUATION PROCEDURES .....	9
4.1.1 TECHNICAL EVALUATION.....	9
4.2 BASIS OF SELECTION .....	9
4.2.1 HIGHEST COMBINED RATING OF TECHNICAL MERIT (70%) AND PRICE (30%) .....	9
<b>PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION .....</b>	<b>11</b>
5.1 CERTIFICATIONS REQUIRED WITH THE BID .....	11
<b>PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS.....</b>	<b>13</b>
6.1 SECURITY REQUIREMENTS.....	13
<b>PART 7 - RESULTING CONTRACT CLAUSES .....</b>	<b>14</b>
7.1 STATEMENT OF WORK.....	14
7.2 STANDARD CLAUSES AND CONDITIONS .....	14
7.3 SECURITY REQUIREMENTS .....	14
7.4 TERM OF CONTRACT.....	14
7.5 AUTHORITIES.....	14
7.5.2 PROJECT OR TECHNICAL AUTHORITY.....	15
7.5.3 CONTRACTOR'S REPRESENTATIVE.....	15
7.6 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS.....	15
7.7 PAYMENT.....	15
7.8 INVOICING INSTRUCTIONS.....	16
7.9 CERTIFICATIONS AND ADDITIONAL INFORMATION .....	16
7.10 APPLICABLE LAWS .....	16
7.11 PRIORITY OF DOCUMENTS.....	16
7.12 FOREIGN NATIONALS (CANADIAN CONTRACTOR OR FOREIGN CONTRACTOR) .....	17
7.13 INSURANCE - NO SPECIFIC REQUIREMENT .....	17
7.14 DISPUTE RESOLUTION .....	17
<b>ANNEX A – STATEMENT OF WORK .....</b>	<b>18</b>
<b>ANNEX B BASIS OF PAYMENT .....</b>	<b>30</b>



**APPENDIX 1 - EVALUATION CRITERIA.....34**

1. TECHNICAL CRITERIA.....34

**APPENDIX 2 - FINANCIAL BID PRESENTATION SHEET .....43**



The Articles contained in this document are mandatory in their entirety, unless otherwise indicated. Acceptance of these Articles, in their entirety, as they appear in this document, is a Mandatory requirement of this RFP.

**Suppliers submitting a proposal containing statements implying that their proposal is conditional on modification of these clauses or containing terms and conditions that purport to supersede these clauses or derogate from them will be considered non-responsive.**

Bidders with concerns regarding the provisions of the Bid Solicitation document (including the Resulting Contract Clauses) should raise such concerns in accordance with the Enquiries provision of this RFP.

By signing its bid, the bidder confirms that they have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and certifies that:

1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation;
2. This bid is valid for the period requested in the bid solicitation;
3. All the information provided in the bid is complete, true and accurate; and
4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.



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## **PART 1 - GENERAL INFORMATION**

### **1.1 Introduction**

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, the Security Requirements Checklist, the Federal Contractors Program for Employment Equity - Certification, the Insurance Requirements and any other annexes.

### **1.2 Summary**

By means of the RFP, Natural Resources Canada (NRCan) is seeking proposals from bidders to help in accelerating the adoption of Ongoing Commissioning (OCx) in the entire federal building portfolio as a key strategy for reaching and maintaining the GHG emission reduction targets set by the GGS.

There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

The requirement is subject to the provisions of the: World Trade Organization Agreement on Government Procurement (WTO-AGP), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CCoIFTA), the Canada-Panama Free Trade Agreement (CPanFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), the Canadian Free Trade Agreement (CFTA), the Canada-Ukraine Free Trade Agreement (CUFTA) and the Canada-Korea Free Trade Agreement (CKFTA).

### **1.3 Debriefings**

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within fifteen (15) working days from receipt of the results of the bid solicitation process. The debriefing will be done in writing, by email.



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## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The [2003](#) (2022-03-29) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

- **In the complete text content (except Section 1 and 3)**  
**Delete:** Public Works and Government Services Canada” and “PWGSC”  
**Insert:** “Natural Resources Canada.” and “NRCan”
- **At 02 Procurement Business Number:**  
**Delete:** “Suppliers are required to”  
**Insert:** “It is suggested that suppliers”
- **At 08 Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service, article 1:**  
**Delete:** in its entirety
- **At 08 Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service, article 2a:**  
**Delete:** : The only acceptable email address to use with CPC Connect for responses to bid solicitations issued by PWGSC headquarters is: [tpsgc.pareceptiondessaoumissions-apbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca](mailto:tpsgc.pareceptiondessaoumissions-apbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca). or, if applicable, the email address identified in the bid solicitation.  
**Insert:** The only acceptable email address to use with CPC Connect for responses to bid solicitation issued by NRCan is: [procurement-appvisionnement@NRCan-RNCan.gc.ca](mailto:procurement-appvisionnement@NRCan-RNCan.gc.ca)
- **At 08, Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service, article 2b:**  
**Delete:** “six business days”  
**Insert:** “five business days”
- **At 20, Further information, article 2b:**  
**Delete:** in its entirety

Subsection 5.4 of [2003](#), Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days  
Insert: 180 days

### 2.2 Submission of Bids

Bidders must submit all proposals using the Canada Post Canada (CPC) Connect service. Given the current constraints on NRCan’s networks, the electronic mail system has a limit of 1GB per single message received and a limit of 20GB per conversation.



Bids must be submitted no later than the date and time indicated on page 1 of the bid solicitation.

**Only bids submitted using CPC Connect service will be accepted.**

At least five (5) business days before the bid solicitation closing date, it is necessary for the Bidder to send an email requesting to open CPC Connect conversation to the following address:

[procurement-apvisionnement@NRCan-RNCan.gc.ca](mailto:procurement-apvisionnement@NRCan-RNCan.gc.ca)

**Note 1:** Bids will not be accepted if e-mailed directly to this address. This e-mail address is to be used to open CPC Connect conversation, as detailed in the Standard Instructions [2003 \(article 08, paragraph 2\)](#), or to send bids through CPC Connect message if the bidder is using its own licensing agreement for CPC Connect.

**Note 2:** Send as early as possible in order to ensure a response, Requests to open a CPC Connect conversation received after that time may not be answered.

**IMPORTANT:** It is requested that you write the bid solicitation number in "Subject" of the email:  
[NRCan-5000075127 – OCx Provider - NRCan](#)

NRCan will not assume responsibility for proposals directed to any other location.

The onus is on the Bidder to ensure that the bid is submitted correctly using CPC Connect service. Not complying with the instructions may result in NRCan's inability to ascertain reception date and/or to consider the bid prior to contract award. Therefore, NRCan reserves the right to reject any proposal not complying with these instructions.

Due to the nature of the bid solicitation, bids transmitted by email, mail or facsimile to NRCan will not be accepted.

### 2.3 Former Public Servant

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

#### Definitions

For the purposes of this clause, "former public servant" is any former member of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a) an individual;
- b) an individual who has incorporated;
- c) a partnership made of former public servants; or



- d) a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

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

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

### Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes**  **No**

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

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

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2019-01](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

### Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes**  **No**

If so, the Bidder must provide the following information:

- a) name of former public servant;
- b) conditions of the lump sum payment incentive;
- c) date of termination of employment;
- d) amount of lump sum payment;
- e) rate of pay on which lump sum payment is based;
- f) period of lump sum payment including start date, end date and number of weeks;
- g) number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

## 2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or





may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

## 2.5 Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

## 2.6 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least five (5) calendar days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

## 2.8 Basis for Canada's Ownership of Intellectual Property

Natural Resources Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following reasons: as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#)

1. National security.
2. Where statutes, regulations or prior obligations of the Crown to a third party or parties preclude Contractor ownership of the Foreground IP.
3. When the Contractor declares in writing that he/she is not interested in owning the Foreground IP.
4. Where the main purpose of the Crown Procurement Contract, or the deliverables contracted for, is:

4.1 To generate knowledge and information for public dissemination.

4.2 To augment an existing body of Crown Background as a prerequisite to the transfer of the expanded Background to the private sector, through licensing or assignment of ownership (not necessarily to the original contractor), for the purposes of Commercial Exploitation.

4.3 To deliver a not-yet fully developed component or subsystem that will be incorporated into a complete system at a later date, as a prerequisite to the planned transfer of the complete system to the private sector, through licensing or assignment of ownership, for the purposes of Commercial Exploitation.

5. Where the Foreground IP consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.

## 2.9 Bid Challenge and Recourse Mechanisms

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



- (b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:
- Office of the Procurement Ombudsman (OPO)
  - Canadian International Trade Tribunal (CITT)
- (c) Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.



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## **PART 3 - BID PREPARATION INSTRUCTIONS**

### **3.1 Bid Preparation Instructions**

Canada requests that the Bidder submits its bid in separately bound sections as follows:

Section I: Technical Bid (1 electronic copy)

Section II: Financial Bid (1 electronic copy) [in a separate file and document](#)

Section III: Certifications (1 electronic copy)

Section IV: Additional Information (1 electronic copy)

**Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.**

#### **Section I: Technical Bid**

In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

#### **Section II: Financial Bid**

Bidders must submit their financial bid in accordance with the Pricing Schedule in Basis of Payment in Annex B.

##### **3.1.2 Exchange Rate Fluctuation**

[C3011T \(2013-11-06\)](#) Exchange Rate Fluctuation

#### **Section III: Certifications**

Bidders must submit the certifications and additional information required under Part 5.



## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

#### 4.1.1 Technical Evaluation

Mandatory and point rated technical evaluation criteria are included in Appendix 1 – Evaluation Criteria.

### 4.2 Basis of Selection

#### 4.2.1 Highest Combined Rating of Technical Merit (70%) and Price (30%)

1. To be declared responsive, a bid must:
  - a. Comply with all the requirements of the bid solicitation; and
  - b. meet all mandatory criteria; and
  - c. obtain the required minimum of 45 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 75 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70 % for the technical merit and 30 % for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70 %.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30 %.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equal 135 and the lowest evaluated price is \$45,000 (45).

<b>Basis of Selection - Highest Combined Rating Technical Merit (70%) and Price (30%)</b>			
	<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>
<b>Overall Technical Score</b>	115/135	89/135	92/135
<b>Bid Evaluated Price</b>	\$55,000.00	\$50,000.00	\$45,000.00



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<b>Calculations</b>	<b>Technical Merit Score</b>	$115/135 \times 70 = 59.63$	$89/135 \times 70 = 46.15$	$92/135 \times 70 = 47.70$
	<b>Pricing Score</b>	$45/55 \times 30 = 24.55$	$45/50 \times 30 = 27$	$45/45 \times 30 = 30$
<b>Combined Rating</b>		84.18	73.15	77.70
<b>Overall Rating</b>		1st	3rd	2nd



## PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder’s certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

### 5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

#### 5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the [Forms for the Integrity Regime](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

#### 5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

- Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder or, in the case of a private company, the owners of the company.
- Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).
- Bidders bidding as partnerships do not need to provide lists of names.

Name of Bidder: \_\_\_\_\_

OR

Name of each member of the joint venture:

Member 1: \_\_\_\_\_

Member 2: \_\_\_\_\_

Member 3: \_\_\_\_\_

Member 4: \_\_\_\_\_

Identification of the administrators/owners/Board of Directors:



SURNAME	NAME	TITLE

**5.2.2 Federal Contractors Program for Employment Equity - Bid Certification**

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](#) website.

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid list at the time of contract award.

**5.2.3.2 Education and Experience**

SACC Manual clause [A3010T](#) (2010-08-16) Education and Experience.

**5.2.3.3 Former Public servant**

<p><b>Former Public Servants</b></p> <p>See the Article in Part 2 of the bid solicitation entitled Former Public Servant for a definition of "Former Public Servant".</p>	<p>Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"</p>
	<p>Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"</p>

**SIGNATURE for CERTIFICATION**

The Contractor certifies having read and understood the information included in the present document and acknowledges receipt.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Authorized Representative



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## PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS

### 6.1 Security Requirements

1. Before award of a contract, the following conditions must be met:
  - a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
  - 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 Part 7 – Resulting Contract Clauses;
  - c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
2. Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
2. For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.





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## PART 7 - RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

### 7.1 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "\_\_\_\_\_" and the Contractor's technical bid entitled \_\_\_\_\_, dated \_\_\_\_\_. (*to be completed at contract award*)

### 7.2 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

#### 7.2.1 General Conditions

[2035 \(2022-12-01\)](#), General Conditions - Higher Complexity - Services, apply to and form part of the Contract. [If applicable, replace references to Public Works and Government Services Canada (PWGSC) with Natural Resources Canada (NRCan)]

#### 7.2.2 Supplemental General Conditions

The following clauses apply to and form part of this contract:

[4007 \(2022-12-01\)](#), Canada to Own Intellectual Property Rights in Foreground Information apply to and form part of the Contract.

### 7.3 Security Requirements

7.3.1 The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the Contract.

### 7.4 Term of Contract

#### 7.4.1 Period of the Contract

The period of the Contract is from date of Contract to March 31, 2025 Inclusive.

#### 7.4.3 Comprehensive Land Claims Agreements (CLCAs)

The Contract is not subject to any Comprehensive Land Claims Agreements.

### 7.5 Authorities

#### 7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Bianca Moore  
Title: Procurement Specialist  
Natural Resources Canada (NRCan)  
Procurement Services Unit  
Address: 580 Booth Street, Ottawa, ON K1A 0E4  
Telephone: 343-543-4785



E-mail address: [bianca.moore@nrcan-rncan.gc.ca](mailto:bianca.moore@nrcan-rncan.gc.ca)

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

**7.5.2 Project or Technical Authority (to be provided at contract award)**

The Project Authority for the Contract is:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

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

Telephone: \_\_\_\_ - \_\_\_\_ - \_\_\_\_\_

E-mail address: \_\_\_\_\_

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority; however, the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

**7.5.3 Contractor's Representative (to be provided at contract award)**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

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

Telephone: \_\_\_\_ - \_\_\_\_ - \_\_\_\_\_

E-mail address: \_\_\_\_\_

**7.6 Proactive Disclosure of Contracts with Former Public Servants**

By providing information on its status, with respect to being a former public servant in receipt of a [Public Service Superannuation Act](#) (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with [Contracting Policy Notice: 2019-01](#) of the Treasury Board Secretariat of Canada.

**7.7 Payment**

**7.7.1 Basis of Payment - Firm Price**

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price, as specified in Annex B for a cost of \$ \_\_\_\_\_ (*insert the amount at contract award*). Customs duties are included, and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

**7.7.3 Method of Payment**

**Milestone Payments**



Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

## 7.8 Invoicing Instructions

Invoices shall be submitted using **the following method**:

E-mail:

[Invoicing-Facturation@nrcan-rncan.gc.ca](mailto:Invoicing-Facturation@nrcan-rncan.gc.ca)

**Note:** Attach "PDF" file. No other formats will be accepted

Invoices and all documents relating to a contract must be submitted on the Contractor's own form and shall bear the Contract number: \_\_\_\_\_

**Invoicing Instructions to suppliers:** <http://www.nrcan.gc.ca/procurement/3485>

## 7.9 Certifications and Additional Information

### 7.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

### 7.9.2 Federal Contractors Program for Employment Equity - Default by the Contractor

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

## 7.10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

## 7.11 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the Articles of Agreement;
- (b) the supplemental general conditions [4007](#) (2022-12-01) – Canada to Own Intellectual Property Rights in Foreground Information;



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- (c) the general conditions 2035 (2022-12-01), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.
  - (d) Annex A, Statement of Work;
  - (e) Annex B, Basis of Payment;
  - (f) the Contractor's bid dated \_\_\_\_\_, (*insert date of bid*) (*If the bid was clarified or amended, insert at the time of contract award:* ", as clarified on \_\_\_\_\_ " **or** ", as amended on \_\_\_\_\_ " *and insert date(s) of clarification(s) or amendment(s)*).

#### **7.12 Foreign Nationals (Canadian Contractor **OR** Foreign Contractor)**

SACC Manual clause A2000C (*insert date*) Foreign Nationals (Canadian Contractor)

**OR**

SACC Manual clause A2001C (*insert date*) Foreign Nationals (Foreign Contractor)

#### **7.13 Insurance - No Specific Requirement**

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

#### **7.14 Dispute Resolution**

- (a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- (b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- (c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- (d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "Dispute Resolution".



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## ANNEX A – STATEMENT OF WORK

### 1.0 TITLE

Smart Building and OCX Demo

### 1.1 BACKGROUND

Approximately 18% of Canada’s Green House Gas (GHG) emissions come from residential, commercial and institutional buildings when electricity-related emissions are included. Moreover, it is estimated that over 75% of Canada’s building floor space in 2030 and beyond will consist of existing buildings still in use.

The Government of Canada has one of the largest and most diverse property portfolio in the country, with over 38,000 buildings. The buildings include a wide variety of archetypes ranging from office buildings to research facilities and special purpose military buildings.

Since 2016, the Government of Canada has made unprecedented investments and introduced a wide range of policies to combat climate change. Measures to GHG emissions and support the transition to a clean economy have been put in place through climate plans<sup>1</sup>, such as the *Pan-Canadian Framework on Clean Growth and Climate Change (2016)*, *A Healthy Environment and a Healthy Economy - Canada's Strengthened Climate Plan (2020)*, and *Canada's 2030 Emissions Reduction Plan (2022)*, as well as through numerous budget commitments. The Government of Canada has also committed to achieving net-zero greenhouse gas emissions by 2050, which has been enshrined in the *Canadian Net-Zero Emissions Accountability Act*<sup>2</sup> since June 29, 2021.

The Treasury Board Secretariat’s (TBS) Greening Government Strategy (GGS) requires departmental action on the net-zero carbon plan in order to achieve a scope 1 & 2 minimum of 90% GHG emission reduction, aspiring to be net-zero by 2050. The “low carbon operations” section of the TBS GGS states:

*“The government will manage its real property portfolios to minimize their GHG emissions. Departments will implement low-carbon real property operations, which include:*

*...*

*recommissioning large energy-intensive buildings on a regular cycle and/or implementing smart building technology”*

### 1.2 OBJECTIVE

The overall objective of this project is to accelerate the adoption of Ongoing Commissioning (OCx) in the entire federal building portfolio as a key strategy for reaching and maintaining the GHG emission reduction targets set by the GGS.

OCx is a subset of Existing Building Commissioning (EBCx), and is a specific and ongoing process of monitoring, investigating, evaluating, and improving systems performance to maintain the current functional requirements and performance standards of the built infrastructure.<sup>3</sup>

Considering that several federal buildings will undergo major renovation projects to meet GGS commitments, the need for building managers and operators to be equipped with new methods of effectively operating these systems – as well as monitoring and controlling their performance in the long term becomes crucial to ensure persistency of GHG emissions reduction efforts. In order to mitigate the risks of sudden equipment malfunction, occupancy or inappropriate control changes, and unexpected energy and GHG emission increases, integrating

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<sup>1</sup> <https://www.canada.ca/en/services/environment/weather/climatechange/climate-plan.html>

<sup>2</sup> <https://www.canada.ca/en/services/environment/weather/climatechange/climate-plan/net-zero-emissions-2050/canadian-net-zero-emissions-accountability-act.html>

<sup>3</sup> Source: *Ongoing Commissioning Best Practices* – Building Commissioning Association



OCx into regular operation and maintenance (O&M) and energy management activities is instrumental in helping departments rise to the challenge of optimal performance sustainability.

### 1.3 SCOPE

The project focuses on developing an OCx program for NRCan's portfolio, as well as demonstrating the value of OCx in one of its main campus by using the Smart Building and OCx Implementation Guide currently under development, in partnership with other federal departments. The project will allow the customization of the guidance, and showcase the benefits of the approach, enabling replication of the approach across the federal building portfolio. CanmetENERGY in Varennes (CE-V) will support NRCan's Real Property division, by applying the developed guidance, providing awareness and training sessions on the OCx process, and monitoring the results through measurement and verification (M&V).

NRCan is seeking an OCx provider with relevant experience to lead the development of an OCx program, and to implement the OCx process as prescribed in the following scope of work. The provider will be accountable for successfully implementing and fine tuning the OCx process and demonstrating that the process meets the expected results.

The expected results are to demonstrate the value of OCx, by leveraging the integration of smart building technologies, human aspects and process requirements in the endeavour towards sustaining GHG emission reductions. The OCx demonstrations will assist in monitoring the process, documenting lessons learned and results, validating and updating the content of the Smart Building and OCx Implementation Guide, and developing policy requirements. The resulting outcomes will serve as the cornerstone for accelerating the adoption of OCx as a global strategy in the sustaining of benefits from energy saving and GHG reduction projects.

The project may as well enable future development of supporting means, such as a pre-screening tool and a statement of work template, which could facilitate the inclusion of OCx requirements in major retrofits, energy performance contracts (EPC) and new construction projects.

## 2.0 Scope of Work

This work statement complies with the Building Commissioning Association (BCxA)'s "Ongoing Commissioning Best Practices"<sup>4</sup>.

The Scope of Work for the OCx provider is comprised of four phases. Phase 1 ("Planning Phase") will consist of planning activities, such as the onboarding of the OCx provider and of the project team, the review and documentation of project goals, the development of a portfolio-wide OCx program, and the identification of smart building technology and OCx services requirements at the selected campus. The main deliverables of the planning phase are the portfolio-wide OCx program and the OCx plan for the selected campus, including a project management plan and a change management plan, and the measurement and verification (M&V) plan. Phase 1 will run from June – December 2023.

In Phase 2 ("Implementation Phase"), a diagnostic plan will be developed, including an outline of the activities that will be performed to measure and monitor the building's performance, and the criteria that will be used for identifying, classifying and reporting issues and findings. The Smart Building Platform (SBP) will be implemented to support the execution of the diagnostic plan. Guidance will be provided and training will be conducted to familiarize the project team with the use of the SBP with the OCx process and associated activities. The guidance and training sessions, along with the outcome of all previous activities, will enable the project team in identifying issues, possible energy conservation measures (ECMs) and facility improvement measures (FIMs), which will be documented into a Master List of Findings (MLoF). Ultimately, the findings should lead to corrective actions and to the implementation of ECMs and FIMs. The outcomes of the changes and the building performance will be tracked periodically, using the pre-defined metrics from the OCx plan and

<sup>4</sup> <https://www.bcxa.org/resources/ongoing-building-commissioning-best-practices.html>



M&V plan, in order to confirm the effectiveness of the implemented measures. Phase 2 includes two sub-phases (Preparation and Execution), and will run from January to December 2024.

Phase 3 (“Sustainment Phase”) will entail a transition to stable operations, shifting primary OCx activities to the building’s O&M team. To do so, these activities will be integrated into the building’s operation and maintenance standard procedures. The frequency of ongoing support from the OCx provider will be reduced to quarterly reviews. During the Sustainment Phase, the OCx provider will monitor and document the progress of the project towards its goals. Phase 3 will run from January 2025 to March 2026.

Phase 4 (“Project Closure”) is the final phase in the scope of work. During this phase, case studies and a final report will be developed to document the highlights and outcomes of the project. A business case, based on the OCx and Smart Building Implementation Guide as well as on the results of the demonstration project, will also be developed to help justify the undertaking of OCx and to support policy development within an organization. Phase 4 will run from October 2025 – March 2026.

### **3.0 TASKS AND DELIVERABLES**

#### **PHASE 1: PLANNING (MAY – DEC 2023)**

##### **Phase 1 Scope of Work**

#### **A. PORTFOLIO-WIDE OCx PROGRAM**

##### **1. Define program objectives & goals, and form the multidisciplinary team**

- Interview program sponsors to determine and document program goals
- Meet with program stakeholders (owner, sponsor, IT, vendor, MSI, etc.) to define roles and responsibilities across the 4 project phases.

##### **2. Conduct a preliminary cost benefit analysis**

##### **3. Perform portfolio condition assessment and measurement baseline**

- Conduct an initial assessment of the buildings physical condition, mechanical systems, control system, and relative energy consumption to form the foundation for screening candidates.
- Develop and conduct a prioritization process for candidate buildings, systems and strategies.

#### **B. OCx IMPLEMENTATION AT SELECTED CAMPUS**

##### **1. Assist with building selection**

- Assist NRCAN team in the selection of the campus buildings by assisting with the development of criteria (systems to be integrated).
- Perform pre-screening of candidate buildings using developed criteria.
- Conduct a gap analysis of existing technology infrastructure, including diagnostic scans of BAS, metering systems and other data sources to determine viability of integration to the energy management and information system (EMIS) / smart building platform (SBP).
- Document deficiencies (network, device, equipment, other), and provide to FM team for remediation.

##### **2. Perform Site Condition Assessment**

- Review the Current Facility Requirements (CFR), and perform high level documentation of building systems and sequence of operation (SoO)
- Conduct a building operator interview to determine operating and maintenance challenges, and recent/upcoming capital projects
- Perform an energy & carbon emission benchmarking exercise to determine site’s performance and to develop a baseline.



- 
- Review Preventive Maintenance (PM) tasks and maintenance contracts, and document any gaps in scope.
  - Review diagnostic scan results, and document any gaps in infrastructure, or remediation items for OCx exercise
  - Populate the Master List of Findings (MLoF), document facility potential, and provide high level recommendations on how to use OCx findings to augment PM process
- 3. Assist with the selection of the energy management and information system (EMIS) / smart building platform (SBP)**
- Determine technology use and design, based on the technology gap analysis
  - Guide NRCAN in acquiring and deploying an appropriate EMIS / SBP and recommend evaluation criteria.
  - Review SBP vendor submissions including platform capabilities using the selected evaluation criteria. Rank platforms and provide recommendation to NRCAN team.
- 4. Develop the EMIS / SBP Integration, Configuration and Commissioning Plan**
- Gather BAS and meter system points list and develop detailed inventory of systems and points that the EMIS / SBP will integrate with.
  - Work with EMIS / SBP vendor to document the details of the data model, and fine tune the model based on points list.
  - Define the metrics and analytics which will be used to evaluate performance – energy, carbon, equipment performance, comfort, maintenance, etc.
  - Document Fault Detection and Diagnostics (FDD) rules, and other analytics that will be applied (general, equipment specific and system wide).
  - Define the visualizations, analytics, reports and users that will be setup in the software
  - Detail required notifications and alerts in the event of loss of building data, and software outage, as well as a triaging procedure.
  - Develop a plan for software commissioning (all above items), and summarize into a checklist.
- 5. Develop the OCx Implementation Plan**

The OCx Implementation plan will outline the people, processes and tools that are required to successfully implement the OCx program.

- Portfolio approach
  - Provide recommendations on portfolio priorities for candidate buildings, systems and strategies.
- Project Management and change management approach
  - Define process for how findings will be discovered, investigated and validated using the EMIS / SBP
  - Define the key performance indicators, targets, and reports to be used
  - Document the key roles and responsibilities – i.e. who does what, and who looks at what information generated by the EMIS / SBP
  - Define the frequencies of team meetings, and information to be discussed
  - Develop a process for implementation of findings (Facility Improvement Measures)
  - Determine and document incentivization mechanisms that will increase adoption of the OCx program and processes.
  - Recommend training activities for stakeholders to learn about the EMIS / SBP
- Measurement and Verification (M&V) approach
  - Define targets that support the project goals, for example: operating cost reduction, GHG emission reduction, comfort improvement, number of findings vs. number of findings resolved, etc.





- Determine the baseline metrics for M&V
- Define how the SBP will be used to collect data and calculate results for M&V
- Sustainment approach
  - Provide recommendations on how to sustain results, and ensure OCx process is maintained
  - Provide recommendations for maintenance contract rescoping
  - Summarize facilities team procedure and workflow for reviewing KPIs
  - Recommendation on program targets, KPIs, team incentives

## Phase 1 Deliverables

### 1. OCx Program, Plan and Presentation

The main deliverable for the planning phase is the OCx Program. This document will consist of the information in the sections described in the above scope of work, including:

- OCx program description
- Program goals, objectives and scope
- OCx team, and their roles and responsibilities
- Condition assessment & initial findings (includes site pre-screening & diagnostic results)
- EMIS / SBP Integration, Configuration and Commissioning Plan
- OCx Implementation Plan
  - Portfolio approach
  - Project management and change management approach
  - M&V approach
  - Sustainment approach

The OCx provider will prepare and deliver a summary presentation of the OCx Plan to project stakeholders upon completion of the plan.

### 2. Demonstration Site Recommendation

The OCx provider will prepare a memo that outlines a recommendation on the demonstration site, including rationale for the recommendation.

### 3. EMIS / Smart Building Platform Recommendation

The OCx provider will prepare a memo that outlines a recommendation on the EMIS / Smart Building Platform and rationale for the recommendation.

## PHASE 2: IMPLEMENTATION (JANUARY – DECEMBER 2024)

The Implementation phase consists of two subphases:

- Preparation subphase: January – June 2024
- Execution subphase: July – December 2024

### Preparation Subphase Scope of Work

#### 1. Develop the OCx Diagnostic Plan

The Diagnostic Plan details the activities that will be performed to optimize the building's performance, as well as the data that will be used to measure and monitor its performance. The diagnostic plan must include (but not limited to):

- Tasks – OCx tasks that will be performed ongoing to optimize the building
  - Analysis of utility meter data
  - Performance benchmarking
  - Schedule Reviews (equipment, lights, occupancy)



- Trend Analyses of building system data: load profiles, peak load, control loop and sequences of operation
- Functional Testing
- FDD Review
- Alarm Review
- **Indicators** – Information that will be used to measure performance
  - Energy Performance – EUI, ECI, normalized energy consumption vs. actual use (daily/monthly)
  - Carbon Performance – current vs. baseline
  - FDD performance – equipment performance score (time in fault vs. out), aggregate system performance score, whole building score, comfort score
  - FDD work order completions
  - Preventive maintenance completions
- **Acceptable/target performance** – The target, or range of performance that is acceptable for each indicator
- **Action** – Procedure to be initiated if an indicator is outside of target range and the parties responsible for the action

It is recommended that the above details be summarized in a table, for example:

OCx Task	Frequency	Indicator	Target	Action	Responsibility
Activity that will help to improve the performance of the building	Frequency that the task should be performed	Metric/KPI that provides a specific measure of the building's performance	Target performance for the indicator, including a tolerance	Specific procedure to be taken if the indicator is outside of range	All parties responsible for the action

The diagnostic plan must also include a description of the following:

- How issues will be identified, prioritized, and tracked using the SBP
- Priority of tasks
- Accountable roles for remediation
- Remediation procedure

## 2. Update the Facility Guide

The Facility Guide details the routines for operating and maintaining the building and is used as a reference for the facility manager and building operators. The Facility Guide will be updated with the OCx approach, and will include:

- The Current Facility Requirements
- OCx Plan
- Diagnostic Plan
- PM Tasks, including inspection, calibration, and maintenance
- Existing, and any new operating instructions for the O&M personnel.

## 3. Update the SBP Implementation, Configuration and Commissioning Plan

- Update the plan to include the data, analytics, visualizations and reports required to support the Diagnostic Plan
- Update the SBP Cx checklist to ensure items for the diagnostic plan are included (analytics, visualizations, reports)

## 4. Assist with Implementation of the SBP



- Assist SBP vendor and MSI with integration and configuration of the platform by providing oversight, and communicating requirements according to the SBP integration, configuration and commissioning plan
  - Assist SBP vendor with configuration of platform - analytics, dashboards, reports, FDD rules, and any other analytics, reports, or visualizations required to implement the Diagnostic Plan.
  - Validate the SBP according to the integration, configuration and commissioning checklist
  - Document any remediation items in the master list of findings
- 5. Kickoff the OCx Implementation with each demonstration site**
- Plan and host a kickoff meeting with each demonstration site.
  - Review the Diagnostic Plan and OCx plan with the project teams from each demonstration site, review roles and responsibilities.
  - Inform teams of execution sub-phase timing and OCx procedure.

## Execution Subphase Scope of Work

### 1. Conduct Training

- Coordinate with the SBP vendor to deliver training on the SBP to project stakeholders, including features, navigation, analytics, and reports.
- Conduct training on the Diagnostic Plan, and review roles and responsibilities, and procedure for resolving FIMs
- Training to project stakeholders should include relevant elements from the OCx Implementation Plan (Project Management, Change Management, Measurement and Verification, and Sustainment approaches)

### 2. Implement the Diagnostic Plan

- Perform activities according to the Diagnostic Plan, utilizing the SBP to identify new issues not included in the MLoF, and monitor status of existing issues.
- Host monthly meetings with the core OCx team to review new FIMs, FIMs in progress, and project KPIs/ performance metrics
- Prioritize and obtain approval to implement FIMs
- Take corrective action to implement FIMs, for example implement schedule changes, low/no cost fixes, and sequence of operation changes
- Assist project team with troubleshooting and resolution of FIM implementation
- Coordinate PM activities with OCx diagnostic activities amongst project stakeholders. Keep track of recommendations to better align PM and OCx activities
- Document all system changes that are implemented
- On a monthly basis, review project status and progress towards project goals and targets with project sponsors, and discuss any program blocks

### 3. Update the Master List of Findings (MLoF)

- Throughout the Execution Subphase, review the data and insights generated by SBP platform and add FIMs to the MLoF, in the SBP. Each FIM should include a description of the finding, solution, status and benefit (for example, energy reduction, cost reduction, comfort improvement).
- Review the MLoF periodically and re-prioritize FIMs as necessary.
- Keep the MLoF current by updating the status of FIMs (in progress, on hold, resolved, etc.) and updating notes on FIMs

### 4. Monitor and report results

- Monitor and report on qualitative improvements, such as engagement of project stakeholders, staff-development, adoption of OCx process



- Document project progress, challenges and lessons learned
- Track building performance and update M&V (savings) results against major project goals as project progresses (ex: energy, emissions, cost reductions, improvement in comfort, etc.)

**5. Prepare for transition of OCx program to facility team**

- Identify champion on each FM team who will lead OCx process
- During monthly meetings (and especially starting Q4 2024), involve champions in taking leadership position to coordinate and orchestrate meetings
- Train the champions on the OCx process - finding FIMs, conducting meetings, keeping documentation, etc.

6. Work with the SBP vendor to update and re-configure the SBP platform as necessary (changes to analytics, visualizations, reports, etc.)

**Phase 2 Deliverables**

**1. The following documents should be updated throughout the Implementation Phase as the project progresses and changes to initial plans are made.**

- Diagnostic Plan
- Updated OCx Plan
- Updated Facility Guide
- Master List of Findings

**2. Executive Summary and Presentation**

At the conclusion of the Implementation Phase, prepare a report on the project, and deliver a presentation to project stakeholders that includes:

- Summary of findings
- Analysis of findings
- Progress towards project goals and targets, including change in key metrics/KPIs
- Lessons learned
- Commentary on OCx process changes, team engagement and adoption of process
- Recommendations on change to the OCx process

**Phase 3: Sustainment (January 2025 – March 2026)**

**Phase 3 Scope of Work**

**1. Implement Operation and Maintenance (O&M) procedures**

O&M procedures ensures integrity of the OCx process - accurate data from devices, integrity of data collected from devices, and integrity of analytics applied to data. Tasks include:

- Establish preventive maintenance procedure and calibration plan for meters, sensors and devices that the SBP is integrated to.
- Develop preventive maintenance and triaging procedures for SBP data related issues – data outages, erroneous data, erroneous analytics, software malfunction
- Work with SB vendor to program platform to alert when loss of data occurs, implement monitoring and notifications for data outside of range, as well as software outage
- Develop plan and procedure to periodically review configuration of analytics within SBP to ensure insights being generated by the SBP are correct and accurate
- As sustainment progresses, keep track of recommendations to better align PM and OCx activities

**2. Transition OCx program to facility team**



- Beginning January 2025, transition ownership of the OCx process and monthly meetings to the FM teams.
- From January – March 2025, supervise the FM champions in leading the OCx monthly meetings, and act as a guide during meetings to ensure a smooth transition.
- Starting April of 2025, transition to hosting quarterly OCx meetings, and have FM champion to lead monthly meetings all other times.

### **3. Monitor and report results**

- Monitor and report on qualitative improvements, such as engagement of project stakeholders, staff-development, adoption of OCx process
- Document project progress, challenges and lessons learned
- Track building performance and update measurement and verification (savings) results against major project goals as project progresses (ex: energy, emissions, cost reductions, improvement in comfort, etc.)

### **4. Update documents**

- Update the OCx Plan, Current Facility Requirements document, and Diagnostic Plan with above (O&M) plans and procedures.

## **Phase 3 Deliverables**

1. Updated OCx Plan, CFR document, Diagnostic Plan
2. On a monthly basis, issue executive summary of updates on project progress towards goals (should be automated report from the SBP, or dashboard). Comment on team engagement, and provide synopsis of FIMs discovered, closed.
3. On a quarterly basis provide update presentation to the project sponsors on the on the progress of the project, KPIs/key metrics, progress towards project goals and targets, as well as blockers and lessons learned.
4. Memo per demonstration site outlining recommendations on scope changes to preventive maintenance to better support and align with OCx process

## **Phase 4: Project Closure (October 2025 – March 2026)**

### **1. Develop a case study for each demonstration project:**

- Summarize project goals, composition of the OCx team
- Summarize and describe the building type, systems, selected SBP
- Describe the number of data points integrated, and the types of analytics deployed, as well as the Diagnostic Plan that was developed
- Provide commentary on the OCx process, team adoption of the process, and lessons learned
- Summarize the project results and provide quantitative measure of performance, as it aligns to the project goals

### **2. Develop a business case for OCx**

- Capture aggregate quantitative data on costs and savings from each demonstration site, as well as additional benefits (ex: emissions reduction, energy consumption, comfort improvement, etc.)
- Capture information on additional qualitative benefits observed
- Draft a business case that presents, at a minimum, the following: scope of OCx undertaken, cost, financial benefit, energy and emissions benefit, other quantitative and qualitative benefit, and return on investment.

### **3. Provide input into the development of the final Greening Government Fund (GGF) report**



- Assist NRCAN team with the development of the FFD final report, to document project scope, costs, benefits and recommendations
- Provide information for the report as requested
- Assist in proofreading and editing the final GGF report

#### Phase 4 Deliverables

1. One case study per demonstration project as detailed in the Phase 4 Scope of Work
2. One business case for the OCx program as detailed in the Phase 4 Scope of Work

### 3.2 Project Schedule

The following tables summarizes the project schedule, and deadlines for all deliverables in each phase of the project.

Project Phase	Task	Deadline
<b>Phase 1: Planning (Contract start – December 2023)</b>	Phase 1 scope of work, including deliverables 1, 2 and 3	December 31, 2023
<b>Phase 2: Implementation (January – December 2024)</b> <b>Preparation subphase (January – June 2024)</b> <b>Execution subphase (July – December 2024)</b>	Preparation subphase scope of work	June 30, 2024
	Execution subphase scope of work	December 31, 2024
	Phase 2 final deliverables 1 and 2	December 31, 2024
<b>Phase 3: Sustainment</b>	Phase 3 scope of work, including deliverables 1, 2, 3 and 4	March 31, 2026
<b>Phase 4: Project Closure</b>	Phase 4 scope of work, including deliverables 1 and 2	March 31, 2026

\*\* The above deadlines are suggested timelines not a concrete schedule.

## 4.0 CONSTRAINTS

### 4.1 Requirements

They OCx agent is responsible for overseeing the entire project, from project coordination to submittal of deliverables. The agent is responsible for any quality concerns with the deliverables or investigative work. The agent is expected to travel to the demonstration site locations as necessary to complete the scope of work.

The OCx agent is responsible for ensuring that all staff understand and adhere to federal and provincial laws on personnel security, and the Canadian Labour Code – Part II (Workplace Health and Safety).

The OCx agent may be called on to work in a variety of conditions, including in remote regions and/or city centers. The agent must be bi-lingual in English and French.

### 4.2 Location of Work

The demonstration site is the Great Lakes Forestry Centre, located at 1219 Queen Street, Sault Ste. Marie, ON.



Demonstration site buildings will be accessible throughout the project and the agent must abide by pandemic safety measures in place. Buildings will be available during regular business hours Monday to Friday, excluding statutory holidays, unless otherwise arranged after the contract is awarded.

#### 4.3 Demonstration Site Information

Documentation on each of the demonstration sites will be provided, where available. Typical site documentation includes:

- Mechanical as-built drawings
- Electrical as-built drawings
- Architectural as-built drawings
- Controls as-built drawings
- Metering as-built drawings and lists
- Current Facility Requirements / Sequence of Operation Manual / Building Operating Manual
- Utility bills

Remote access to building systems (ex: Building Automation System, Meter data acquisition system, existing smart building platform) will be provided to the OCx agent, where available.

The OCx agent is required to pursue further investigation on-site to confirm the accuracy of the information provided and to pursue additional information that is required (i.e. taking BAS screenshots, interviewing the operations teams, measurement through data loggers or investigating actual operation).

#### 4.4 Language of Correspondance and Deliverables

Meetings held with the project team (excluding project sponsor) will be held in the language of the client's choice, either English or French. Meetings held with the project sponsor (including the project team) will be held in English. All deliverables submitted by the OCx agent must be in English.

### 5. Definitions

**Current Facility Requirements (CFR):** a written document that describes the owner's current functional requirements regarding how a facility should be used and operated.

**Fault Detection and Diagnostics (FDD):** is a method that uses sensors, data analysis, and algorithms to detect, diagnose, and isolate issues ("faults") in building systems. FDD is usually facilitated by the use of a Smart Building Platform (SBP).

**Facility Improvement Measure (FIM):** Actions taken to improve the performance, energy efficiency, comfort, or equipment function of a building, including equipment upgrades and no cost/low cost OCx measures.

**Master List of Findings (MLoF):** a document that lists all of the issues, faults, Facility Improvement Measures (FIMs) identified during OCx activities.

**Master Systems Integrator (MSI):** the entity responsible for integrating various building and control systems, and systems with the Smart Building Platform.

**Measurement and Verification (M&V):** a process for measuring, verifying, and reporting on a building's energy performance, often in relation to a baseline or target.

**Ongoing Commissioning (OCx):** a process used to optimize and sustain building performance on an ongoing basis by investigating, analyzing and monitoring the performance of building systems.



**Sequence of Operation (SoO):** A detailed description of how a building's systems should operate under different scenarios and conditions (ex: season, weekday vs. weekend). The SoO documents all of the actions and parameters used to operate the systems efficiently.

**Smart Building Platform (SBP):** A technology that orchestrates data from building systems, and provides insights into building performance to support decision making on Facility Improvement Measures.





## ANNEX B BASIS OF PAYMENT

(Will be completed at contract award)



**ANNEX C SECURITY REQUIREMENTS CHECK LIST**



Government of Canada /  
Gouvernement du Canada

Contract Number / Numéro du contrat

178381

Security Classification / Classification de sécurité  
UNCLASSIFIED

**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	Natural Resources Canada	2. Branch or Directorate / Direction générale ou Direction EETS
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Develop a O&C program for NRCan real property portfolio and provide ongoing commissioning services for one demonstration project.		
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 checked="" type="checkbox"/> No Non	<input 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 type="checkbox"/> No Non	<input checked="" 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 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"/>	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 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"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité  
UNCLASSIFIED





Government of Canada  
Gouvernement du Canada

Contract Number / Numéro du contrat
178381
Security Classification / Classification de sécurité UNCLASSIFIED

**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 / Non  Yes / Oui  
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 / Non  Yes / Oui

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

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> 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 / Non  Yes / Oui  
If Yes, will unscreened personnel be escorted?  
Dans l'affirmative, le personnel en question sera-t-il escorté?  No / Non  Yes / Oui

**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 / Non  Yes / Oui

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 / Non  Yes / Oui

**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 / Non  Yes / Oui

**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 / Non  Yes / Oui

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 / Non  Yes / Oui

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité UNCLASSIFIED
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Contract Number / Numéro du contrat 178381
Security Classification / Classification de sécurité UNCLASSIFIED

**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	SECRET	TOP SECRET	
											A	B	C				
Information / Assets Renseignements / Éléments Production																	
IT Media / Support IT																	
IT Link / Lien électronique																	

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 « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation 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 indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



## APPENDIX 1 - EVALUATION CRITERIA

Bidders are advised to address these criteria in the following order and in sufficient depth in their proposals to enable a thorough assessment. NRCan's assessment will be based solely on the information contained within the proposal. NRCan may confirm information or seek clarification from bidders.

Bidders are advised that only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the criteria will not be considered demonstrated for the purpose of this evaluation.

The Bidder should provide complete details as to where, when (month and year) and how (through which activities/ responsibilities) the stated qualifications/experience were obtained. Experience gained during formal education shall not be considered work experience. All criteria for work experience shall be obtained in a legitimate work environment as opposed to an educational setting. Co-op terms are considered work experience provided they are related to the required services.

Bidders are also advised that the month(s) of experience listed for a project whose time frame overlaps that of another referenced project will only be counted once. For example: project one time frame is July 2001 to December 2001; project two time frame is October 2001 to January 2002; the total months of experience for these two project references is seven (7) months.

### 1. Technical Criteria

#### 1.1 Mandatory Evaluation Criteria

The Mandatory Criteria listed below will be evaluated on a simple pass/fail basis. Proposals which fail to meet the mandatory criteria will be deemed non-responsive.

Criterion ID	Mandatory Requirements	Pass (P) / Fail (F)	PAGE #
M1	<p><b>Building Commissioning Experience</b></p> <p>The bidder MUST demonstrate that at least two of the proposed resources for the project has a minimum of 5 years of experience in Existing Building Commissioning (EBCx), or Ongoing Commissioning (OCx) <b>AND MUST</b> provide their curriculum vitae.</p>		
M2	<p><b>Proven abilities in OCx / EBCx</b></p> <p>The bidder MUST demonstrate that at two of the proposed resources for the project meets either of the following requirements:</p> <ul style="list-style-type: none"> <li>- has earned a training certificate in ongoing commissioning (OCx) or in existing building commissioning (EBCx) , OR;</li> <li>- appears on an accredited EBCx agents list of a provincial or utility incentive program for existing building</li> </ul>		



	<p>commissioning and holds a valid certificate</p> <p><b>A proof to this effect (training certificates, accreditation, or hyperlink of the web page listing the accredited EBCx agents) MUST be provided as an appendix to the proposal.</b></p> <p><b>* NOTE:</b> The training certificate must have been obtained after an existing building commissioning exam, delivered by a recognized institution. Certificates not mentioned above will require the bidder to provide a detailed description of the training content, the name of the certifying institution as well as a copy of the certificate, valid at the solicitation closing date.</p> <p>Below are the recognized lists, certificates and institutions:</p> <ul style="list-style-type: none"> <li>- Lists of accredited EBCx agents <ul style="list-style-type: none"> <li>• Continuous optimization program approved service providers (BC Hydro)</li> <li>• Liste des agents accrédités en RCx (TEQ)</li> <li>• Building optimization approved service providers (Efficiency Nova Scotia)</li> </ul> </li> <li>- EBCx training certificates <ul style="list-style-type: none"> <li>• Advanced course on EBCx and exam (NRCan)</li> <li>• Advanced course on EBCx (CIET)</li> <li>• Certified Building Commissioning Professional (CIET)</li> <li>• Certified Commissioning Professional (BCA)</li> <li>• Building Commissioning Professional (ASHRAE)</li> <li>• Existing Building Commissioning Professional (AEE)</li> <li>• Retrocommissioning of Existing Building Certified Professional (NEBB)</li> <li>• Commissioning Process Existing Buildings (UWisconsin)</li> </ul> </li> </ul>		
<p><b>M3</b></p>	<p><b>Project Experience</b></p> <p>The bidder MUST demonstrate experience within 3 projects for which they were the agent/provider of OCx, or EBCx services between January 1st, 2020 and the bid solicitation closing date.</p>		



	<p>In order to demonstrate that their company possesses the required experience, the bidder should provide the following information:</p> <ol style="list-style-type: none"> <li>1. Project Name</li> <li>2. Project Summary</li> <li>3. Project Start and Completion Dates</li> <li>4. Contact Name and Contact Information (references*)</li> </ol> <p>Note: If the information provided is deemed insufficient for fulfilling project requirements in terms of the above-mentioned criteria, the bid will be considered non-responsive.</p> <p>* References may be contacted to confirm the information provided.</p>		
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### 1.2 EVALUATION OF RATED CRITERIA

NRCan will use the criteria contained herein to evaluate each proposal that has met all of the rated criteria.

Proposals must obtain at least the pass mark indicated for each criterion and for all the rated criteria in order to be deemed compliant with the rated technical criteria; proposals not obtaining the minimum points required will be deemed non-compliant.

<b>EVALUATION GRID</b>			
<b>100%</b>	The rated criteria are addressed in full detail and the information provided shows that the bidder fully and thoroughly understands all elements of the rated criteria.	The resource has advanced competencies in OCx and demonstrates excellent skills with respect to the requirements of the Statement of Work.	The project described is relevant and convincing, and presents major impacts, in line with the requirements of the statement of work.
<b>80%</b>	The information provided clearly shows the bidder fully understands all elements of the rated criteria, but there are some minor gaps.	The resource has thorough competencies in OCx and demonstrates good skills with respect to the requirements of the Statement of Work.	The project described is relevant and presents significant impacts, in line with the requirements of the statement of work.
<b>60%</b>	The information provided clearly shows the bidder understands certain but not all elements of the rated criteria.	The resource has acceptable competencies in OCx and demonstrates sufficient skills with respect to the requirements of the Statement of Work.	The project described is adequate and presents acceptable impacts, in line with the requirements of the statement of work.
<b>40%</b>	The information provided shows a basic understanding of the specified criteria, without showing that the bidder fully understands all elements of the rated criteria.	The resource has partial competencies in OCx and demonstrates basic skills with respect to the requirements of the Statement of Work.	The project described is ordinary and presents minor impacts in relation to the requirements of the statement of work.



<b>20%</b>	The information provided shows that the bidder has a limited understanding of the specified criteria.	The resource has minimal competencies in OCx and demonstrates poorly developed skills with respect to the requirements of the Statement of Work.	The project described has little relevance and presents non-significant impacts in relation to the requirements of the statement of work.
<b>0%</b>	The information provided does not meet the criteria.	The resource has no competencies in OCx and does not demonstrate any skills with respect to the requirements of the Statement of Work.	The project described is irrelevant and presents no impacts in relation to the requirements of the statement of work.

Proposals will be evaluated based on the following criteria:

Criterion ID	Point Rated Technical Criteria	Rated Items	Maximum points	Score	Page #
<b>C1</b>	<p><b>Work Plan</b></p> <p>The proposal SHOULD provide a work plan demonstrating the supplier's understanding of the scope of work.</p>	<p><b>Relevance and consistency</b> of the work plan with the statement of work: does the work plan meet the needs and objectives. The proposed approach aligned with the tasks and activities. (20 pts)</p> <p><i>* This criterion will be evaluated according to the evaluation grid presented above.</i></p>	<b>20 points</b>		
<b>C2</b>	<p><b>Relevance and experience of the project team</b></p> <p>The proposal SHOULD provide an organizational chart of the project team, as well as a presentation of each of the individuals (in addition to adding their curriculum vitae as an appendix) in order to demonstrate the skills of the team as well as the individuals' experience and abilities.</p>	<p><b>Relevance and efficiency</b> of the composition <b>of the project team</b> in relation to the services sought. (10 points)</p> <p><i>* This item will be evaluated according to the evaluation grid presented above.</i></p> <p><b>Experience with smart building analytics software:</b></p> <p>The bidder SHOULD demonstrate that one of the proposed resources has experience in implementing and using smart building analytics software to drive building operating performance efficiencies, within the past 5 years prior to the bid solicitation closing date. (10 pts)</p> <ul style="list-style-type: none"> <li>- Experience of less than 3 years = 0 pts</li> <li>- Experience greater than or equal to 3 years but less than 5 years = 4 pts</li> <li>- Experience greater than or equal to 5 years but less than 7 years = 7 pts</li> </ul>	<b>40 points</b> <b>Pass mark 26 / 40</b>		





		<p>Experience of more than 7 years = 10 pts</p>			
		<p><b>Experience in Ongoing Commissioning (OCx):</b> The bidder SHOULD demonstrate that one of the proposed resources has experience in ongoing commissioning, within the past 5 years prior to the bid solicitation closing date. (10 pts)</p> <ul style="list-style-type: none"> <li>- Experience of less than 3 years = 0 pts</li> <li>- Experience greater than or equal to 3 years but less than 5 years = 4 pts</li> <li>- Experience greater than or equal to 5 years but less than 7 years = 7 pts</li> </ul> <p>Experience of more than 7 years = 10 pts</p>			
		<p><b>Experience in program development:</b> The bidder SHOULD demonstrate that one of the proposed resources has work experience in program development related to OCx, EBCx, energy management, or energy efficiency, within the last 10 years prior to the bid solicitation closing date. (10 points)</p> <ul style="list-style-type: none"> <li>- Experience of less than 3 years = 0 pts</li> <li>- Experience greater than or equal to 3 years but less than 5 years = 4 pts</li> <li>- Experience greater than or equal to 5 years but less than 7 years = 7 pts</li> </ul> <p>Experience of more than 7 years = 10 pts</p>			



<p style="text-align: center;"><b>C3</b></p>	<p><b>Proven abilities in ongoing commissioning</b></p> <p>The Bidder SHOULD provide information demonstrating the abilities of the resource(s) assigned to the project.</p>	<p>For the resources identified in the question above, the bidder SHOULD demonstrate their abilities in ongoing commissioning, by providing an example of a project that they have worked on. For this project, the bidder SHOULD prepare a short document (3 pages maximum) that describes in detail:</p> <ul style="list-style-type: none"> <li>- The project, including type of building, duration of project, scope, project stakeholders, your role as the OCx agent.</li> <li>- The OCx process, including approach to finding improvement measures, remediation approach, frequency of meetings, and roles and responsibilities of project stakeholders</li> <li>- Approach to building operator/facilities management team engagement in the OCx process</li> <li>- Types of improvement measures found, approach to measurement and verification</li> <li>- How smart building analytic software and building system telemetry was used to find improvement measures, facilitate the OCx process, validate improvements</li> <li>- Benefits found, including cost, emissions, comfort, and lessons learned</li> </ul> <p><i>* This item will be evaluated according to the evaluation grid presented above.</i></p>	<p style="text-align: center;"><b>20 points</b></p> <p style="text-align: center;"><b>Pass mark 12 / 20</b></p>		
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<p><b>C4</b></p>	<p><b>Achievements</b> The proposal should demonstrate the supplier's ability to perform the requested services by submitting a <b>maximum of 6 achievements completed within the last 5 years</b> preceding the closing date of the bid solicitation, specifying the following information:</p> <ul style="list-style-type: none"> <li>• Identification of the project</li> <li>• Summary of the work</li> <li>• Contract value</li> <li>• Start and end date of the mandate</li> <li>• Individual(s) who participated in the project, including their role</li> <li>• Contact details of the contact person at the customer</li> </ul>	<p><b>2 achievements in smart buildings</b></p> <p><b>Relevance and impact</b> of achievements in commercial and institutional buildings. (5 pts per project, max. 10 pts)</p> <p><i>* This item will be evaluated according to the evaluation grid presented above.</i></p> <hr/> <p><b>2 achievements in OCx</b></p> <p><b>Relevance and impact</b> of achievements in commercial and institutional buildings. (5 pts per project, max. 10 pts)</p> <p><i>* This item will be evaluated according to the evaluation grid presented above.</i></p> <hr/> <p><b>2 achievements in program development</b></p> <p><b>Relevance and impact</b> of the achievements, in connection with smart buildings, OCx, energy management, energy efficiency or the reduction of greenhouse gas emissions in commercial or institutional buildings. (5 pts per project, max. 10 pts)</p> <p><i>* This item will be evaluated according to the evaluation grid presented above.</i></p>	<p><b>30 points</b></p>		
<p><b>C5</b></p>	<p><b>Quality of the Proposal</b></p>	<p><b>The quality and clarity</b> of the proposal will be assessed according to the following criteria:</p> <ul style="list-style-type: none"> <li>• Compatibility between the structure of the document and that outlined in the assessment criteria</li> <li>• Ease with which relevant information can be obtained</li> <li>• Concision</li> <li>• Quality of visual presentation</li> <li>• Quality of language</li> </ul> <p>Note: The proposal should be less than 20 pages (excluding appendices), 8½ x 11 inch</p>	<p><b>10 points</b></p>		



		<p>format, and use a minimum 10 point font.</p> <p><i>* This item will be evaluated according to the evaluation grid presented above.</i></p>			
<b>C6</b>	<p><b>Diversity and Inclusion</b> The Bidders should demonstrate the following corporate activities they have implemented to promote anti-racism and diversity within their organisation:</p> <ul style="list-style-type: none"> <li>a. The bidder has internally published policies or commitments on anti-racism and inclusiveness</li> <li>b. The bidder has publicly available organisational commitments to a diverse workforce</li> <li>c. The bidder’s employees are mandated to take mandatory training on anti-racism</li> <li>d. The bidder’s employees are mandated to take unconscious bias training</li> <li>e. The bidder has developed internal staffing and/or recruitment strategy(ies) to increase representation of underrepresented groups in their workforce.</li> </ul> <p>The bidder should provide details of the following activities.</p> <p>For activities described in a. and b. (Policy and commitments), the bidder should provide copies of policy or commitment documents including their effective date. For activities described in c. and d. (training), the bidder should provide the name of the course and the service provider; if developed internally, a copy of the course outline.</p>	<p>0 pts = the bidder does not address. 1 pts = The bidder has provided information on the existence of the activity but does not provide sufficient detail or supporting documents. 3 pts =The bidder has fully described the activity and provided supporting documents as evidence.</p> <p><b>Total of 3 points</b></p>	<b>3</b>		



	For activities described in e. (staffing), the bidder should provide copies of job posting, or other staffing/recruitment documents demonstrating compliance with the rated criteria.				
<b>Total (pass mark = 85 points)</b>			<b>143</b>		



## APPENDIX 2 - FINANCIAL BID PRESENTATION SHEET

### 1. Firm Price - Milestone Payments

Bidder tendered all-inclusive firm price to perform the work is in Canadian funds, applicable taxes excluded. Any Travel and Living Expenses and other miscellaneous expenses must be included in the firm price.

***The bidder must complete the schedule below indicating the firm proposed amounts for each step according to the indicated percentages:***

Year	Firm Price (Applicable Taxes Excluded)
Phase 1 : Planning	\$ _____
Phase 2 : Implementation	\$ _____
Phase 3 : Sustainment	\$ _____
Phase 4 : Project Closure	\$ _____
Total Firm Price for Financial Proposal Evaluation (Taxes Extra):	\$ _____