



**Housing Services Corporation**

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**REQUEST FOR PROPOSAL #19-265-03  
HOUSING SERVICES CORPORATION**

**BUILDING CONDITION ASSESSMENTS, ELEVATOR  
AUDITS & CAPITAL RESERVE FUND FORECASTS**

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**Date Issued:** Wednesday, January 9, 2019

**Closing Date:** Wednesday, January 30, 2019  
2:00 p.m. EST (Toronto time)

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## 1. INTRODUCTION

Housing Services Corporation (HSC), on behalf of the City of Toronto Housing Stability Services (HSS) (the Client), invites prospective proponents to submit proposals for the provision of engineering services to complete: Building Condition Assessments (BCAs), Elevator Audits, Capital Reserve Fund Forecasts (CRFFs), Energy Audits, and Accessibility Audits for multiple non-profit and co-operative social housing providers as listed in **Appendix B**.

HSC is seeking and inviting qualified service-oriented consultants with relevant experience in a project of similar size, scope and complexity, with strong scheduling abilities, and experience in managing and coordinating the work, to qualify for the noted upcoming project.

The purpose of this RFP is to select one or more qualified Proponents with whom HSC shall negotiate and enter into a Consulting Agreement (Agreement) to deliver the Services.

The Scope of Services listed in this RFP has been separated into a Base Scope of Work and Additional Services. The Base Scope of Work consists of: the Building Condition Assessments (BCAs), Elevator Audits and Capital Reserve Fund Forecasts (CRFFs). An additional price shall be submitted for consideration by HSS to carry out the Additional Scope of Services, as listed within this RFP, to conduct Energy Audits, Accessibility Audits and Cut Tests.

This RFP is not a formal tender call and does not create any binding legal obligations on HSC.

## 2. HSC

HSC was established by the Province of Ontario under the provisions of the Housing Services Act (Ontario). The Act established HSC as an independent not-for-profit corporation to represent the interests of its members consisting of municipal service managers, local housing corporations and the non-profit and co-operative housing providers previously administered by the provincial government. There are approximately 1,500 housing providers in Ontario being administered by HSC.

HSC fulfills the need for consistent quality and facilitates value-added services to housing providers across Ontario while taking advantage of economies of scale. These services empower housing providers to develop safe and affordable homes and vibrant communities. We manage mandated group insurance and natural gas programs for the housing sector. We also use our expertise to offer regeneration, project management,

training, research, information technology solutions and technical services. See [www.hscorp.ca](http://www.hscorp.ca) for more details.

### **3. CITY OF TORONTO HOUSING STABILITY SERVICES**

The City of Toronto Housing Stability Services (HSS) is responsible for the funding and administration of social housing within the city. HSS administers approximately 250 housing providers with approximately 95,000 units of housing. Approximately one-third of these units are owned and operated by private and co-operative housing providers.

### **4. BACKGROUND**

This RFP arises under an initiative by HSS to assist participating housing providers to either develop or update current capital reserve plans and to begin to collect building data for future implementation into a portfolio wide asset database.

At the request of HSS, HSC has agreed to administer this RFP process on behalf of the HSS and act as project manager for the Services as outlined in **Appendix A**.

### **5. SCOPE OF SERVICES**

Please refer to the attached **Appendix A** for the Scope of Services.

#### **5.1 Requirements**

HSC requests Proponents to review the requirements outlined in **Appendix A** and provide HSC with the information as indicated in the Form of Response, attached as **Appendix D**.

#### **5.2 Contracting Approach**

It is the present intention of HSC to enter into an Agreement with one or more Successful Proponents to deliver the Services.

The Agreement to be signed by the Successful Proponent(s) shall be in the form required by HSC and shall include the following terms:

- The Successful Proponent(s) shall perform the Services outlined in this RFP under Service Plan.
- At the sole discretion of HSC, the Successful Proponent(s) can be used for additional skills or services to those identified provided that they relate to the Services.
- Pricing is fixed for the period of the Agreement

The form of Agreement to be signed by the Successful Proponent(s) is attached as **Appendix E**. Any comments to this form of Agreement must be included in the Form of Response, attached as **Appendix D**.

## **6. CONFIDENTIALITY**

All information provided to you by HSC in connection with this RFP either before or after the issuance of this RFP:

- a) is the sole property of HSC and must be treated as confidential;
- b) is not to be used for any purpose other than replying to this RFP;
- c) must not be disclosed without prior written authorization from HSC; and
- d) shall be returned by you to HSC immediately upon the request of HSC.

Confidential Information shall not include:

- a) information generally available to the public other than as a result of a breach of these confidentiality obligations;
- b) information that becomes available to either party through no breach of any contract or law;
- c) information that either party develops independent of the information provided to it by the other party; or
- d) information that is required to be disclosed by applicable laws or regulation including the Municipal Freedom of Information and Protection of Privacy Act (Ontario) which is binding on HSC.

## **7. RESERVATION OF RIGHTS RE: RFP**

HSC reserves the right in its sole discretion and for any reason whatsoever:

- a) to accept or to reject any or all Proponent responses in whole or in part,
- b) not to proceed with all or any part of the Services, or
- c) issue a second RFP.

Once the Agreement is signed with the Successful Proponent(s), HSC shall notify the other Proponents that they have been unsuccessful in this RFP.

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## 8. PROPONENT INSTRUCTIONS

### 8.1 Questions

Any questions on this RFP should be directed in writing via e-mail to Rosabelle Gonzales at [rfg@hscorp.ca](mailto:rfg@hscorp.ca) no later than **Wednesday, January 16, 2019 by 2:00 p.m. EST, Toronto time.**

### 8.2 Responses to this RFP

Proponents must include all information requested and provide it in the order in which it is requested on the Form of Response, attached as **Appendix D**. Proponents that fail to provide all information requested may be disqualified.

Proponents must complete each section of the attached Form of Response document. Proponents shall submit their response to this RFP via HSC's Bonfire portal.

Please follow these instructions to submit via our Public Portal.

- Prepare your response materials:

#### Requested Information

Name	Type	# Files	Requirement
Form of Response	File Type: Any (*.*)	Multiple	Required

#### Requested Documents:

Please note the type and number of files allowed. The maximum upload file size is 100 MB.

Please do not embed any documents within your uploaded files, as they will not be accessible or evaluated.

- Upload your response at:

<https://hscorp.bonfirehub.ca/opportunities/19097>

Your response must be uploaded prior to the Closing Date of **Wednesday, January 30, 2019, by 2:00 p.m. EST**. We strongly recommend that you give yourself sufficient time

and at least ONE (1) hour before the Closing Date to begin the uploading process and to finalize your response.

**Important Notes:**

Each item of Requested Information is instantly sealed and will only be visible after the Closing Date.

Uploading large documents may take significant time, depending on the size of the file(s) and your Internet connection speed.

You will receive an email confirmation receipt with a unique confirmation number once you finalize your response.

Minimum system requirements: Internet Explorer 8/9/10+, Google Chrome, or Mozilla Firefox. Javascript must be enabled.

**Need Help?**

Housing Services Corporation uses a Bonfire portal for accepting and evaluating proposals digitally. Please contact Bonfire at [Support@GoBonfire.com](mailto:Support@GoBonfire.com) for technical questions related to your response. You can also visit their help forum at <https://bonfirehub.zendesk.com/hc>.

**8.3 Participation Instructions**

Information directing prospective Proponents to the RFP documentation will be made available on the following electronic tendering services: MERX - website: [www.merx.com](http://www.merx.com), e-mail: [merx@merx.com](mailto:merx@merx.com), telephone number: 1-800-964-6379; Biddingo.com - website: [www.biddingo.com](http://www.biddingo.com), e-mail: [info@biddingo.com](mailto:info@biddingo.com), telephone number: 1-888-891-8314; as well as HSC's website [www.hscorp.ca](http://www.hscorp.ca) .

**8.4 Amending or Withdrawing Proposals Prior to Proposal Submission Deadline**

At any time prior to the Proposal Submission Deadline, a Proponent may amend or withdraw a submitted proposal. Any amendment should clearly indicate what part of the proposal the amendment is intending to replace.

A notice of amendment or withdrawal must be sent to the address of HSC's Manager of Procurement and Compliance.



**8.5 HSC May Seek Clarification and Incorporate Response into Proposal**

HSC reserves the right to seek clarification and supplementary information relating to the clarification from Proponents after the Proposal Submission Deadline. The response received by HSC from a Proponent shall, if accepted by HSC, form an integral part of that Proponent's proposal. HSC reserves the right to interview any or all Proponents to obtain information about or clarification of their proposals. In the event that HSC receives information at any stage of the evaluation process which results in earlier information provided by the Proponent being deemed by HSC to be inaccurate, incomplete or misleading, HSC reserves the right to revisit the Proponent's compliance with the mandatory requirements and/or adjust the scoring of rated criteria.

**8.6 Evaluation Process**

HSC will conduct the evaluation of proposals in the following two stages:

**Stage I**

Stage I will consist, in part, of a review to determine which proposals have complied with the mandatory requirements outlined below.

	<b>MANDATORY REQUIREMENTS</b>	<b>Y/N</b>
1.	Proposal Form completed and signed by authorized representative	-
2.	Proof of \$5 million General Liability Insurance	-
3.	Proof of \$2 million Professional Liability Insurance	-
4.	Proof of \$2 million Automobile Insurance	-
5.	Proof of WSIB	-
6.	Two references attached	-

Qualified proposals that meet all mandatory requirements will be scored based on the following criteria:

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	<b>EVALUATION CRITERIA</b>	<b>MAXIMUM POINTS</b>
1.	Company Experience including the Client's/HSC's past experience, if applicable, with company	15
2.	Proposed Team and Qualifications including the Client's/HSC's past experience, if applicable, with proposed team members	25
3.	Methodology	20
4.	Quality of sample BCA, Energy and Accessibility Audits	10
5.	Pricing	30
	<b>TOTAL SCORING</b>	100

HSC reserves the right to interview selected proponents, as applicable, as part of the Stage I Evaluation Process.

### **Stage II**

In this final Stage II, the Agreement will be negotiated and finalized for execution with the highest evaluated Proponent(s). The final signed Agreement may contain terms different or supplementary to those contained in the Successful Proponent's proposal.

No Proponent shall have any rights against HSC arising from such negotiations or the failure to execute an Agreement.

If HSC is unable to negotiate and sign the Agreement with the highest evaluated proponent, then HSC shall have the right to either commence negotiations with the next highest evaluated proponent or terminate this RFP.

### **8.7 Tentative Schedule**

<b>TASK</b>	<b>TARGET DATE</b>
Posting of this RFP	Wednesday, January 9, 2019
Deadline for questions	Wednesday, January 16, 2019 by 2:00 p.m. EST
Answers to question and distribution of addendum to RFP, if required	Wednesday, January 23, 2019
Closing date for submission of proposals	Wednesday, January 30, 2019 by 2:00 p.m. EST
Evaluation of proposals	Wednesday, January 30, 2019 – Friday, February 22, 2019

Meetings with selected Proponents, as applicable. Selected Proponents are expected to be available on this day should these meetings be required.	Wednesday, March 6, 2019
Agreement with HSC to take effect	March 2019
Completion of Services	Friday, November 29, 2019

The above dates are tentative and are subject to change without notice.

## 9. GENERAL CONDITIONS

- 9.1 HSC reserves the right to accelerate and postpone the schedule for this RFP.
- 9.2 Each Proponent shall prepare at its sole cost and expense its response to this RFP. HSC shall not reimburse any Proponent for its rejected response.
- 9.3 HSC reserves the following rights:
- 9.3.1. HSC can request that any Proponent clarify or make changes to its response.
- 9.3.2. In evaluating submissions, HSC and HSS may consider the past experience with the Proponent of HSC and HSS.
- 9.3.3. HSC can, in its sole discretion, choose to meet with none, some or all of the Proponents to discuss their response.
- 9.3.4. Responses that are improperly signed, illegible, contain omissions or irregularities may, in HSC's sole discretion, be rejected. HSC may also waive any informality or irregularity.
- 9.3.5. HSC may verify with any Proponent or third party any information set out in the response. HSC may check references other than those provided by any Proponent.
- 9.3.6. HSC may disqualify any response that contains material misrepresentations or any other materially inaccurate or misleading information.
- 9.3.7. HSC, this RFP and all responses to it are governed by the Municipal Freedom of Information and Protection of Privacy Act, Ontario.

These reserved rights are in addition to any other express rights or any other rights which may be implied and HSC shall not be liable for any expenses, costs, losses or direct or indirect damages suffered by a Proponent resulting from HSC exercising any of its express or implied rights under this RFP.

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## APPENDIX A SCOPE OF SERVICES

### **BASE SCOPE OF WORK:**

#### **BUILDING CONDITION ASSESSMENTS, ELEVATOR AUDITS, AND CAPITAL RESERVE FUND FORECASTS**

The Successful Proponent shall undertake the Building Condition Assessments (BCAs), Elevator Audits, and Capital Reserve Fund Forecasts (CRFFs) for the buildings as listed in **Appendix B**.

It is the responsibility of Proponents to familiarize themselves with the project and to ascertain the full scope of work and architectural/engineering services required to provide professional services for the completion of BCAs, Elevator Audits and CRFFs prior to submission of their proposal.

The Successful Proponent:

- shall ensure that all the Work undertaken for this project complies with all applicable laws, codes, and regulations;
- will visit and examine all buildings listed in their awarded group(s) as per **Appendix B** and incorporate a review of existing building drawings, designated substance surveys (DSS) (where available), and discussion with the Housing Provider and facility's operator(s);
- conduct informal interviews with key facility staff to gain an understanding of user groups service requirements and current facility related matters, existing warranties, guarantees and service contracts. Review existing maintenance inspection records, schedules and compliance orders.
- is required to examine a representative sample of each type of dwelling unit, including accessible/modified units, contained in each property with the total number of units to be inspected to equal no more than 10% of the total building unit count;
- in reporting the findings from the assessments, where applicable, indicate the pertinent section and clause of the applicable code that applies to the condition(s) noted;
- will have all engineering disciplines as noted below in order to undertake a visual and non-destructive examination (unless otherwise noted) of each property's capital system and component's in the scope of work:
  - a) Architectural & Structural (including interior/exterior building conditions);
  - b) Mechanical (including HVAC, Fire Protection & Plumbing);
  - c) Electrical (including power distribution, lighting systems, Life Safety & emergency Power);

- d) Site Services (including all hard surfaces, parking, lighting, retaining walls, storm drainage runoff, etc.);
- e) Elevator Condition Inspection;
- f) Capital Reserve Fund Forecast; and
- g) If additional scope is approved (as outlined below):
  - Accessibility Audit and Remedial Work plan.
  - ASHRAE Level II Energy Audit
  - Undertake test cut(s) to assess garage membrane type and condition
- create a comprehensive inventory appropriate for the property, of all capital items, as-built as-installed. The Successful Proponent is to organize the inventory of capital items to that as required by the specified template in **Appendix C**;
- in commenting on the life expectancy of all existing systems, indicate/update remaining life cycle of the existing major components and the remaining duration subject systems are expected to last, with normal/regular scheduled maintenance;
- indicate in the condition assessment if the building and its major components under the study meets current building & fire code standards and if not, what level of repair or replacement, design or rehabilitation would be necessary & applicable cost estimates; and
- provide detailed and summary recommendations related to each building's condition, need for renovation, upgrade to the current Ontario Building Code (OBC), and anticipated cost implications.

#### **Data Collection, Input & Report:**

1. On the completion of the condition inspections, assessments and audits, all data is to be assimilated in standard reports. The report shall be prepared in the standard Microsoft Word (.docx) and Excel (.xlsx) document 2007 format. The Microsoft Word format copy of the report and the Microsoft Excel format copy of the (30 year) spreadsheet will be made available to the consultant. The report will clearly describe the physical condition of each facility. The reports will also identify all observed critical faults, potential structural defects and areas of accelerated deterioration, and generate analysis & lifecycle costing reports, as per the RFP. To illustrate and highlight observations, include coloured images of notable defects or unusual conditions, identifying components and location.
2. Digital photographs shall be taken in order to adequately document the conditions observed during the survey and to highlight deficiencies. These photographs are to form part of the final report. All photos taken during the site assessment should be provided on a USB stick filed by individual housing provider folders.
3. The consultant is to submit an initial (draft) report (in Microsoft Word 2007 format) and its 30 year plan (in Excel 2007) for review. Upon receipt of client approval, the consultant will

then proceed to submit all further reports and corresponding 30 year plans, in accordance with the approved submission.

4. The consultant is to submit one (1) single 30 year plan of each facility consolidating and coordinating all recommendations of repairs / replacements / rehabilitations. Each 30 year plan will include two (2) Capital Reserve Fund Forecast scenarios; a base case and an adjusted case; along with a Facility Cost Index. The Successful Proponent is to organize the CRFF scenarios to that as required by the specified template in **Appendix C**;
5. The consultant will generate the hard copy reports (2 sets in binder format) and a series of USBs Microsoft Word (.docx) and Excel 2007 (.xlsx) containing the database records for each facility.
6. Additional report copies shall be submitted in electronic format (PDF), digital images (JPEG), and layouts (TIF). File naming conventions to be as directed. Files are to be organized in folders, by category. All files to be submitted on USB(s) containing a file index and be formatted so as to be accessible to standard readers.

#### **BUILDING CONDITION ASSESSMENTS & ELEVATOR AUDITS:**

The objectives of Building Condition Assessments (BCAs) and Elevator Audits will be:

- To determine the present physical condition of the listed facilities with respect to structural/architectural components, bldg. envelope, mechanical and electrical systems, fire/life safety systems, & predictive 30 year renewal costs;
- To determine the scope, the timing and current cost of all building component repairs or replacement likely to be required;
- To determine the finances required to be set aside for both normal maintenance & capital repair/replacement of major components for budgetary purposes; and
- To report all findings and recommendations from the above assessments and audits of all repairs, replacements, and rehabilitations in reports and 30 year plans in the formats as stated in this RFP.

#### Responsibilities of the Consultant for Building Condition Assessments:

1. Architectural & Structural
  - a. Review the structural condition of the building to assess its condition, structural adequacy and ability to accommodate the current and future uses.
  - b. Assess the condition of the parking garage structure (where applicable), including but not limited to: floor, ceilings, walls, partitions, ramps, drainage and associated mechanical and life safety systems. Parking garage test cuts to be recommended by consultants where required. Test cuts will be completed as an additional service, where approved.

- c. Assess the exterior cladding (including skylights) and overhead glazing systems, as to its structural integrity to meet the current OBC and energy conservation criteria, as to conditions, suspected or potential moisture penetration, anchorage to structural frame and concerns with all joints & connections.
- d. Assess the condition of all exterior openings (doors & windows) as to air and moisture penetration, energy efficiency, and condition of weather-stripping, caulking and sealants. Additionally, the consultant will provide the window/wall ratio in the body of the report.
- e. Provide a general assessment of the structural system inclusive of but not limited to: structural frame, floor loading, column/bay size.
- f. Assess the maintainability of the structure(s) and its interior/exterior components, including flooring, ceilings, walls, partitions, millwork (fixed position only), finished surfaces (including trim), doors and frames (including hardware). Provide the square footage of commercial tenants on site (If applicable).
- g. Assess drainage (including snow/ice) and interface with surrounding site services. Additionally, the consultant will provide percentage (%) of permeable surface to total site area.
- h. Assess the exterior condition of all buildings inclusive of landscaping & exterior lighting. Provide total site area, total building footprint and gross floor area.
- i. Attention is to be paid to appearance, drainage settlement, pot holes, cracks, pavement repairs, etc., and suitability & life expectancy.
- j. All BCA reports are to describe collected visual information under the following section headings: Introduction, Executive Summary, Methodology, Observations and Recommendations: Site Work, Structural/Building, Envelope, Garage and Substructure, Interiors, Services.
- k. Consultant to confirm the number of modified units at each address through discussions with housing provider. The consultant to determine the approximate year of modification and anticipated compliance with AODA legislations. AODA audit is not required in the base scope.

## 2. Mechanical & Fire Prevention

- a. Provide a detailed description, inventory list & condition of all mechanical systems in the building and the areas served, including but not limited to the following (where applicable): heating & cooling, circulating pumps, garage ventilation, stairwell pressurization, humidification, general exhaust, sanitary & storm systems including sump pumps, fire protection and (HVAC) controls.
- b. Record actual data (type, make, serial no., capacity, air flow, horse power & electrical power supply, etc.) for each piece of equipment & system in the building.
- c. Assess code compliance of each piece of equipment and replacement cost estimates are to be done in accordance with the 30 year cycle to align with CRFF information provided within the BCA report.
- d. Provide all reports and capital expenditure requirements.



### 3. Electrical & Life Safety Systems

Provide a detailed description, inventory list and condition of all electrical systems in the building, including but not limited to the following (where applicable):

- a. Power incoming services – main electrical room, main disconnect switch, transformers, main switchgear & associated equipment;
- b. Power distribution system – distribution switchgear, panel boards, power riser, lighting & receptacle panels, sub-electrical room(s);
- c. Motor control centres, inverter systems;
- d. Outdoor lighting – type & control;
- e. Emergency power system including generators & transfer switches, capacity and systems served;
- f. Fire alarm system, sprinkler system and areas served;
- g. Emergency lighting system; and
- h. Electric ramp, heating, snow melting system (if applicable).

### 4. Roofing Inspections

The roofing inspections will be carried out to determine the following information to be included in the roofing section of each BCA report:

- a. Roof areas, type of roofing membrane, visual drainage issues, roof drains, flashing details, fall arrest, railings and roof anchors, condition & life expectancy, year of installation, year of replacement, repair/replacement cost estimates & roofing plan layout
- b. Access to the roof is entirely the consultant's responsibility (ladder procurement is required).

### Responsibilities of the Consultant for Elevator Audits:

1. To visually evaluate elevating machine rooms, cabs, lifts, hoist-way, pits and lobby equipment. The consultant is to review all on-site maintenance records and log books, conduct assessments & provide budget pricing for renewal of any components. Estimates are to be provided for immediate remedial repair work as identified.
2. As part of the base scope of work, accessibility features installed are to be included and any recommended AODA compliance measures shall be included.
3. Assessment of elevating devices including elevators and lifts must be carried out by an elevator inspection consultant.

## **CAPITAL RESERVE FUND FORECASTS:**

The objective of the Capital Reserve Fund Forecasts (CRFFs) will be:

- To assist participating housing providers to either develop or update their current capital reserve plans; and
- CRFF will be analyzed in two (2) scenarios. The first will be based on existing reserves and the mandated annual contributions. The second will be on recommendation to resolve the funding shortfall based on increased annual contributions.

### Responsibilities of the Consultant:

1. A forecast of the capital reserves in a CRFF using the capital plan created
2. A strategic assessment of the current and long range physical condition and remaining useful life of each property
3. The time period for the capital plan is 30 years commencing in 2019
4. Provide a Facility Condition Index (FCI) calculation for each year based upon the deferred cost in that year divided by the total asset value.
5. The following two (2) CRFF scenarios are to be included:
  - a. Scenario One: Forecast to be based on existing reserves and the mandated annual contributions.
    - A 30 year financial forecast (2019 to 2049)
    - The opening balance of the capital reserve at the beginning of the survey period
    - The program mandated annual capital reserve fund contributions
    - Assumed annual inflationary cost factor
    - Capital replacement costs based on assumed annual inflation rate
    - An assumed annual rate of return on capital reserve investments
  - b. Scenario Two: Forecast to be based on consultant's recommendation to bring the FCI index to 10% or better within ten (10) years forecast based on adjusted annual contributions.
    - A 30 year financial forecast (2019 to 2049)
    - The opening balance of the capital reserve at the beginning of the survey period
    - Annual capital reserve fund contributions as recommended by the consultant
    - Capital replacement costs based on assumed annual inflation rate
    - An assumed annual rate of return on capital reserve investments

6. It is expected the Housing Provider and the consultant will work together and make every effort to address any shortfall prior to finalizing the financial forecast.
7. The consultant will meet with the Housing Provider and HSC to discuss the assumptions to be used for the cost of inflation of capital items and investment earnings on capital reserve balances as well as the inflation factor to be used for annual contributions to the capital reserve fund as applicable.

### **ADDITIONAL SCOPE OF WORK:**

#### **ASHRAE LEVEL II ENERGY AUDITS, AODA AND CUT SHEETS**

As an additional price to the Base Scope of Work outlined above, Proponents are required to provide pricing for conducting the following reports:

- ASHRAE Level II Energy Audits
- Accessibility Audits and Remedial work plan
- Test Cuts to investigate condition of the garage waterproofing system

Please note that the Owner may elect not to proceed with all, or portions, of the additional items. For this reason, Proponents should provide separate pricing for each individual item as shown in the Pricing Form, attached as **Appendix B**. At the time of award, Successful Proponent(s) will be notified of the additional reports to be included with the exception of the test cuts. The facilitation of the test cuts will be determined on a case-by-case basis based upon the recommendations made by the consultant after the initial site visit is made.

#### **ASHRAE LEVEL II ENERGY AUDITS:**

The consultant shall undertake ASHRAE Level II Energy Audits for the buildings as listed in **Appendix B**.

#### **Scope of Work:**

- Provide a detailed survey/evaluation of the building, energy systems, and operations. This should include the Building Envelope, Water Usage, Lighting, Heating, Ventilation, and Air Conditioning (HVAC), Domestic Hot Water (DHW), Plug Loads, and Compressed Air. Identifying the fuel type as well as the manufacturer, model number, age, physical condition and estimated remaining years of service.
- Provide a detailed analysis and a complete breakdown of building utility usage for past two years to present (i.e., operating schedule), consumption and costs by end-use type from (a)

above as determined by a metered utility data analysis and a full lighting audit (indoor and exterior).

- Provide a comparison to utility usage of similar buildings (benchmarking), where available (in which case the source, size and date of the sample used in this comparison is to be provided).
- Identify and rank of potential energy-efficiency measures and their resulting net effect on utility consumption for each energy source, and electricity peak demand reduction for the Facility (highlighting low-cost and no-cost opportunities).
- Identification of potential Greenhouse Gas (GHG) reduction for each measure identified
- Identify measures considered but not recommended along with rationale of why measures were not recommended.
- Provide a range of savings separately and combined, costs, and return on investments (ROI) for each of the energy saving recommendation.
- Identify any noticeable operational and maintenance discrepancies and possible remedies. Include a review of maintenance costs and how implementing recommended measures could reduce those costs.
- Provide an assessment of non-financial considerations, including the health, safety and comfort of the occupants and staff, as well as new skills and training required for staff.
- Provide an outline of priorities, next steps, and identification of measures requiring more thorough data collection and analysis.
- Include in the reporting package an explanation of any assumptions and methodology that building owner and operator will need to know to assess the recommendations.

#### **ACCESSIBILITY FOR ONTARIANS WITH DISABILITIES ACT (AODA) AUDIT AND REMEDIAL WORK PLAN:**

The consultant shall provide technical and professional services for the preparation of a complete Accessibility Audit for the buildings as listed in **Appendix B** based on the following legislation and standards:

- Accessibility for Ontarians with Disabilities Act (AODA)
- AODA, Integrated Accessibility Built Environment Standards, 2010
- AODA, Design of Public Spaces, 2012 (Provincial Act)
- 2015 Ontario's Building Code + Ontario Building Code, 2015 - Amendments to Barrier-Free Section 3.8 under O/Reg 368/13
- CAN/CSA B651-12 Accessible Design for the Built Environment

The Accessibility Audit shall incorporate a Remedial Work Plan formatted into the following categories:

- Category 1: Exterior Areas
- Category 2: Interior Common Areas
- Category 3: Accessible/modified Units - maximum of 10% of unit total
- Category 4: Systems and Controls

The Accessibility Audit and Remedial Work Plan shall be completed to encompass all the accessibility requirements of the above noted legislation and standards, identifying the potential built environment accessibility issues that may be encountered by users in the exterior building approach, entry, interior access routes and use of facility within the building, including exterior spaces and systems and controls.

Scope of Work:

Prepare a Remedial Work Plan capturing all the remedial work required to upgrade the facility to achieve compliance as noted above, and the recommended prioritization of upgrade work, together with estimates of the cost of such remedial work. The Remedial Work Plan shall include the following items:

- Carry out accessibility evaluations for building and site, including all impacts on mechanical, electrical, elevator, fire/life safety services. Provide an overview of the overall level of accessibility for the facility; including, but not limited to: exterior access routes from the street and parking areas, and interior access routes including all common access areas i.e. laundry room, property management office (poor, fair, good).
- Coordinate with HSC's Project Manager and the Housing Provider for all site visits to be carried out by the consultant's audit team.
- Attend site visits as may be required to carry out a thorough evaluation of the full facility.
- Evaluation of priority (3 levels) for each category of remedial work up to a ten (10) year period.
- Identify all accessibility modifications made to date in the facility and determine if they meet current standards as listed.
- Prepare a cost estimate for the scope of remedial work for each category and their sub-categories for each priority level.
- Work plan shall include basic floor plans, identifying the areas of modifications and accessibility upgrades, along with reference photographs to illustrate site conditions.

## **CUT SHEETS:**

### Scope of Work:

- Examine existing construction and condition of the Garage Waterproofing System to determine condition, estimated useful life & quality of installation
- Report on type, thickness and drainage of the overlying materials
- All Test cuts should be performed and repaired by a qualified contractor

## **PROJECT DELIVERABLES AND SUBMISSIONS**

### **PROJECT DELIVERABLES:**

The Consultant shall provide the following deliverables:

1. Provide a current WSIB and proof of insurance within five (5) working days of award of consulting services.
2. The consultant shall meet with HSC and/or HSS staff at a kick-off meeting (either at Metro Hall or HSC's office) to review project intent, scope of work, any known issues, specific requirements, and limitations with regards to the existing building condition and operations that may require special attention when preparing the scope of work. The consultants shall provide a list of staff assigned to the projects and contact information, along with a preliminary schedule of dates structured to meet the requirements of the scope of work within the timelines agreed upon with HSC.
3. The consultant team shall conduct one site visit only in order to gain a full understanding of the site and building, to evaluate the building/site conditions, existing utilities, lighting, services, etc., and gather all information required for completing the work of the contract; both in base scope and additional scope. Exception will be made for the undertaking of recommended and approved test cuts. A secondary site visit will be coordinated in consultation with HSC staff to conduct any approved test cuts.
4. Attend one (1) meeting at HSC's office to review drafts of the audit with HSC staff. Incorporate any requested revisions, and attend one (1) meeting to present the final reports and documents to HSS and/or Housing Provider.
5. Provide the HSC with printed copies and electronic copies of all documentation including but not limited to the following:
  - a. Provide one (1) 'draft' electronic copy of the BCA, Elevator Audit, CRFF for each building for review and approval by HSC

- b. On obtaining approval for additional scope of work, the consultant shall provide one (1) 'draft' electronic copy of the Accessibility Audit and remedial work plan document per building for review and approval by the HSC.
- c. On obtaining approval for additional scope of work, the consultant shall provide one (1) 'draft' electronic copy of the ASHRAE Level II Energy Audit document per building for review and approval by the HSC
- d. On obtaining approval for test cuts, the consultant shall incorporate findings as an appendix to the one (1) 'draft' electronic copy of the BCA where applicable
- e. All photographs which are part of the report shall be printed in colour. Note that site photographs may NOT contain identifiable images of any person.
- f. Note that all evaluations, findings and required work plans contained in the final reports that have to be addressed in order to achieve compliance with legislation and standards as noted above, shall be relied upon by the Housing Providers and HSS for future implementation of capital projects and funding applications for grant programs.
- g. All source text/spreadsheet documents for this project are to be submitted to HSC in digital format on USB or remote storage device, formatted and written using MS Word/Excel in an unprotected format. The Energy Audit & Accessibility Audit and Remedial Work Plan shall be completed on MS Excel and MS Word. Sample spreadsheet templates will be provided to the consultant by HSC.
- h. Provide two (2) final hard copies of all reports in bound format and one (1) electronic copy on USB or remote storage device. All final hard copies reports shall have tabs and be organized per building site. The report contents should include at minimum the following headings and sections per building:
  - i. Table of contents, including a list of appendices and supporting documents
  - ii. Cover Page with relevant Facility Information, Audit date, Housing Provider information, HSS information, GFA, basic building data, etc.
  - iii. General description of the property inspected and a listing of all documentation made available and reviewed.
  - iv. Executive Summary of the site including
    - Overview of existing equipment / systems
    - Analysis of available options
    - Recommended measures with justification
  - v. Statements of Methodology, Prioritization, Terms of Reference, Limitations/Exclusions of the site
  - vi. Building Condition Assessment with a separate chapter identifying any non-compliant observations and major problem areas requiring further investigation identifying any required immediate actions and/or interventions, further in-depth testing required and estimation of costs.
  - vii. Elevator Audit
  - viii. Capital Reserve Fund Forecast commencing in 2019

ix. Appendices + Pertinent Reference Information.

If approved:

- Energy audits
- Accessibility audit & remedial work plan
- Test cut findings

6. All minutes of meetings are to be recorded and distributed by the consultants. Additional meetings requested by HSC will be paid based on an approved unit rate fee established in the price form or at the commencement of the project with HSC.
7. The consultant shall include for all disbursements, including mileage, parking, photocopying, telephone/cellular, courier charges, etc. that may be required for the project.
8. Within five (5) working days of receipt of the Agreement to commence work, the consultant shall provide a schedule of activities identifying the list of tasks and meetings with HSC/HSS and the approved Housing Provider group(s).

**PROJECT SUBMISSIONS:**

The following table summarizes the Project submissions and provides general guidelines on the number of versions and quantities. The “number of versions” indicates, for the same document, the number of draft versions which will be submitted for review to HSC, plus a final version (for example, if 2 versions are specified, this means a draft and a final version, assuming noted deficiencies are adequately addressed). The consultant should note that other deliverables may also be required, as specified within this document.

Major Project Submissions

<b>Submission</b>	<b>No. of Versions</b>	<b>No. of Copies / Format (per version)</b>
Detailed Work Plan	1	1 Electronic, 1 Hardcopy
Meeting Agendas and Minutes	1	1 Electronic, 1 Hardcopy
Draft Reports	1	1 Electronic,
Final Reports	2	1 Electronic, 2 Hardcopy

1. With each printed submission, the consultant shall submit the same documents in .pdf format, and in their native (e.g. Word, Excel, CAD, etc.) format.



2. Draft deliverables submitted for HSC's review shall be essentially complete, so as to allow for proper evaluation of material submitted. Any unfinished or missing sections or elements shall be clearly identified in the draft and a brief description of the intended material is to be provided.
3. The Scope of Work defined in this RFP includes the minimum requirements for the assignment. It shall be the consultant's responsibility to ensure that all deliverables achieve the intent of the Work and the associated reports/documents are provided.
4. All materials, including but not limited to data, calculations, measurements, drawings, specifications, draft reports and final reports shall become the exclusive property of HSS, in all formats.
5. All photographs used in any report shall be in JPEG format and shall not be bigger than 500KB in file size.

## **PROJECT TIMING, MEETINGS AND SCHEDULE**

### **PROJECT TIMING:**

1. The consultant shall commence Work on the project as soon as possible after award.
2. The timeline for the submission of the initial (draft) BCA, Elevator Audits, and CRFF reports on selected buildings is expected to be completed as per schedule identified under Project Schedule below. The consultant shall then submit final BCA reports in two (2) weeks after receipt of HSC's approval of the draft reports. Payment shall only be made for services rendered.
3. The consultant is to provide a detailed project scope breakdown work plan and schedule within two (2) weeks after award for review and approval by HSC. The work plan should be a refinement of the scope of work and schedule submitted in the bid for this Project. The schedule is to be updated monthly, and reviewed with HSC. Changes to the project schedule require a written explanation and must be approved, in writing, by HSC.

### **PROJECT MEETINGS:**

1. The consultant shall be responsible for the preparation of agendas and minutes for the meetings and shall ensure that these are prepared and submitted to attendees within one (1) week prior to and after meetings, respectively.
2. The consultant shall make arrangements for a project commencement meeting with HSC to review the project objectives and schedule.
3. The consultant shall schedule additional meetings, as required, to discuss major issues as they arise.

**PROJECT SCHEDULE:**

The following is the tentative Project Schedule that is subject to change without notice:

- Notification of Successful Proponent(s) Award Date
- Meeting with HSS to review scope Within 5 Days of award
- Detailed Work Plan Within two (2) week of award
- Site review #1 to commence Within three (3) week of award
- Draft report of site #1 Due five (5) weeks after award
- Draft reports of 25% of awarded buildings Due eleven (11) weeks after award
- Draft reports of 50% of awarded buildings Due seventeen (17) weeks after award
- Draft reports of 75% of awarded buildings Due twenty-three (23) weeks after award
- Final copies of all reports completed Due thirty (30) weeks after award

*(Remainder of page intentionally left blank.)*

**APPENDIX B  
LIST OF BUILDINGS AND PRICING FORM**

**Attached as a separate document**

**APPENDIX C**  
**BCA, CRFF, AODA & ENERGY AUDIT TEMPLATES**

**Attached as a separate document**

**APPENDIX D  
FORM OF RESPONSE**

**Attached as a separate document**

**APPENDIX E  
CONSULTING AGREEMENT**

**Attached as a separate document**