

## ROADMAP for Inception and Identification Stages for Asset and Space Based Projects

(<http://www.tpsqc-pwqsc.gc.ca/biens-property/snqp-npms/bi-rp/route-road/index-eng.html>)

Stage 1 – Project Inception		Stage 2 – Project Identification			
1.1 – Definition		2.1 – Initiation	2.2 – Feasibility	2.3 – Analysis	2.4 – Close Out
<b>Objective</b>	Provide a forum for vetting real property proposals to ensure that proposed projects are in keeping with PWGSC portfolio strategies and respond in the most effective manner possible.	Analyze the Statement of Requirements to provide an initial description of the project objectives, and related issues sufficient to allow for a preliminary assessment on approach of the project within PWGSC objectives	Develop the project requirements and identify a range of solutions that meet those requirements.	Examine thoroughly and evaluate the viable options identified in the Feasibility Phase to arrive at the optimum solution that will satisfy the client's requirements and the project's constraints.	Ensure an appropriate level of assessment, reporting, evaluation, handover exchange, and administrative closure has taken place that will provide enough directional detail to seamlessly proceed to the Delivery Stage.
<b>Inputs</b>	<ul style="list-style-type: none"> <li>❑ Problem statement. The issue or opportunity can be:               <ul style="list-style-type: none"> <li>• Asset Based</li> <li>• Client Specific</li> <li>• Portfolio Based</li> </ul> </li> <li>❑ Current / existing problem strategies (e.g. Client plans, National Investment Strategy, Regional Investment Strategy, Community Based Investment Strategy, Asset Management Plans, Building Condition Reports)</li> <li>❑ Workplace 2.0 Accreditation Reference Guide</li> </ul>	<p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li>❑ Signed Client Accommodation Requirements Questionnaire</li> <li>❑ Tenant Requirement Package</li> <li>❑ Approved Statement of Requirements</li> <li>❑ Other currently known project parameters (client requirements)</li> </ul>	<p><u>Asset Specific</u></p> <ul style="list-style-type: none"> <li>❑ Definition of project scope requirements</li> <li>❑ Building Evaluation Report</li> <li>❑ CPBN (for capital project over \$1M)</li> </ul> <p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li>❑ Drafted Project Charter</li> <li>❑ Existing Building Evaluation Report for compliance (level 1)</li> <li>❑ Approved Preliminary Project Plan (PPP)</li> </ul>	<p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li>❑ Functional Program (if required)</li> <li>❑ Finalized Space Requirement</li> <li>❑ Building conditions assessment</li> <li>❑ Approved Feasibility Report</li> <li>❑ PPP with updated parameters</li> </ul>	<p><u>Asset Specific</u></p> <ul style="list-style-type: none"> <li>❑ ADM decision on non-compliance request with Federal Office Building Standards as required</li> <li>❑ TB submission document for PPA approval (if required)</li> </ul> <p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li>❑ ADM decision on non-compliance request with Fit-up Standards as required</li> <li>❑ Signed Project Charter</li> <li>❑ PPA/LPA/LCA (TB submission, if required) and Briefing Note (if Sole Source Lease)</li> <li>❑ Risk Management Plan</li> <li>❑ Approved Investment Analysis Report (IAR)</li> </ul>
<b>Tasks / Activities</b>	<p><b>Step One: Define Assessment</b></p> <ul style="list-style-type: none"> <li>❑ Review and identify stakeholders</li> <li>❑ Consult with stakeholders and document request and/or issue or opportunity</li> <li>❑ Review client/asset requirements and determine as to whether a project should be initiated and whether it is consistent with existing program strategies, client accommodations strategy and overall government priorities (<a href="#">Client Accommodation Requirements Questionnaire</a>)</li> <li>❑ Review Workplace 2.0 Accreditation Reference Guide</li> <li>❑ Review and determine designation of project as Capital (to be capitalized) or Repair (to be expensed)</li> <li>❑ Consider potential for impacts/benefits and identify risks</li> <li>❑ Carry out <a href="#">Project Complexity and Risk Assessment (PCRA)</a> (optional)</li> </ul> <p><b>Step Two: Summarize Decision</b></p> <ul style="list-style-type: none"> <li>❑ Identify funding source to provide seed money for project pre-planning to develop PPA/LPA</li> <li>❑ Obtain approval for initial assessment of risk and potential triggers</li> </ul>	<p><b>Step One: Initiate Project</b></p> <ul style="list-style-type: none"> <li>❑ Identify human resources to set up <a href="#">Project Team</a></li> <li>❑ Create Project File Structure</li> <li>❑ Create SIGMA Work Breakdown Structure Element (WBSE)</li> <li>❑ Verify availability of drawings and specifications with regional/national Geomatics office</li> <li>❑ Assess and document the duty to consult with Aboriginal groups. If required, contact Legal Services for advice and establish an action plan.</li> <li>❑ Create <a href="#">Preliminary Project Plan</a></li> </ul> <p><b>Step Two: Assess Viability</b></p> <ul style="list-style-type: none"> <li>❑ Define Project Parameters</li> <li>❑ Review of Existing Building Evaluation Report for compliance (level 1)</li> </ul> <p><u>Asset Specific</u></p> <ul style="list-style-type: none"> <li>❑ Develop Capital project Briefing Note (CPBN) (for capital project over \$1M)</li> </ul> <p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li>❑ Develop client requirements package</li> <li>❑ Determine the need to develop Functional Program</li> <li>❑ Initiate <a href="#">Fit-up Compliance Monitoring Form</a></li> <li>❑ Assess impact on client space envelop, identify any special requirements and confirm client funding commitment as required</li> <li>❑ Define Geographic Boundaries for new space requirements</li> <li>❑ Initiate <a href="#">Project Charter</a></li> <li>❑ Update Preliminary Project Plan</li> </ul>	<p><b>Step One: Finalize Project Requirements</b></p> <ul style="list-style-type: none"> <li>❑ Evaluate existing building performance if applicable (Crown or lease)</li> <li>❑ Complete building conditions assessment for compliance to latest standards</li> <li>❑ Validate and complete project parameters</li> <li>❑ Assess consistency with ARLU (Annual Reference Level Update)</li> </ul> <p><u>Asset Specific</u></p> <ul style="list-style-type: none"> <li>❑ Finalize asset requirements</li> </ul> <p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li>❑ Review Workplace 2.0 Accreditation Evaluation Grid</li> <li>❑ Prepare Functional Program</li> <li>❑ Finalize Space Requirements</li> </ul> <p><b>Step Two: Identify Viable Solutions</b></p> <p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li>❑ Verify availability of space within PWGSC's space inventory</li> <li>❑ Identify Lease Acquisition Options as per the <a href="#">Framework and Processes for Leasing of Real Property in PWGSC</a></li> <li>❑ Identify Options and establish timeline and risks for each viable option</li> <li>❑ Produce <a href="#">Feasibility Report</a></li> <li>❑ Update key parameters of PPP</li> </ul>	<p><b>Step One: Analyze Information</b></p> <ul style="list-style-type: none"> <li>❑ Validate data in Feasibility Report</li> <li>❑ Gather and review all available Project Documentation</li> <li>❑ Review and confirm timeline and risks for each option</li> <li>❑ Analyze options</li> <li>❑ Recommend optimum solution</li> </ul> <p><u>Asset Specific</u></p> <ul style="list-style-type: none"> <li>❑ Develop indicative cost estimate for each viable option identified in Feasibility Report</li> <li>❑ Identify any non-compliances with Federal Office Building Standards and obtain approval as required</li> </ul> <p><u>Space Specific:</u></p> <ul style="list-style-type: none"> <li>❑ Conduct Market Survey to establish market supply for space (if req'd)</li> <li>❑ Establish cost estimate based on the identified possible procurement options</li> <li>❑ Conduct Market Analysis to establish rental rate</li> <li>❑ Establish target level for Workplace 2.0 Accreditation and incorporate into the Investment Analysis Report (IAR)</li> <li>❑ Identify any non-compliance with <a href="#">Fit-up standards</a> and obtain approval as required</li> </ul> <p><b>Step Two: Produce Approval Documents as per type of project</b></p> <ul style="list-style-type: none"> <li>❑ Prepare <a href="#">IAR</a></li> <li>❑ Complete a Risk Management Plan for the preferred option</li> <li>❑ Complete Environmental Compliance Management Program (ECMP) Checklist (if required)</li> <li>❑ Obtain Preliminary Identification of Environmental Services Required (PIESR) from Environmental Services Directorate (if required)</li> <li>❑ Identify commissioning technical performance expectations and commissioning functional requirements (if required)</li> <li>❑ Reconfirm or update <a href="#">PCRA</a></li> <li>❑ If value of project over departmental delegation, prepare <a href="#">TB Submission Documents</a> for PPA/LPA</li> </ul> <p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li>❑ Obtain client's funding confirmation for client's accommodation costs (if needed)</li> <li>❑ Finalize <a href="#">Project Charter</a> (not required if no fit-up)</li> <li>❑ If recommended option from the IAR is to enter sole source negotiation, prepare briefing note</li> </ul> <p><b>Note:</b> in the case of a lease option recommendation, consideration could be given to also prepare a request for LCA authority</p>	<p><b>Step One: Close-Out Stage activities</b></p> <ul style="list-style-type: none"> <li>❑ Gather team and client feedback and document lessons learned</li> <li>❑ Review project files for completeness</li> <li>❑ Complete Identification Close Out Document</li> </ul>

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1.1 – Definition		2.1 – Initiation	2.2 – Feasibility	2.3 – Analysis	2.4 – Close Out	
Control Point	<ul style="list-style-type: none"> <li><input type="checkbox"/> Signed Client Accommodation Requirements Questionnaire</li> <li><input type="checkbox"/> Broad description of the nature of the request / issue / opportunity</li> <li><input type="checkbox"/> Assessment of the proposal's consistency with related existing program strategies</li> </ul>	<p><u>Asset Specific</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Definition of project scope requirements</li> <li><input type="checkbox"/> Building Evaluation Report</li> <li><input type="checkbox"/> CPBN (for capital project over \$1M)</li> </ul> <p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Drafted project charter</li> <li><input type="checkbox"/> Existing Building Evaluation Report for compliance (level 1)</li> </ul>	<p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Functional Program (if required)</li> <li><input type="checkbox"/> Finalized Space Requirement (Crown/spaces for lease acquisition as required)</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> Building conditions assessment</li> <li><input type="checkbox"/> PPP with updated parameters</li> </ul>	<p><u>Asset Specific</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> ADM decision on request for non-compliance with Federal Office Building Standards as required</li> </ul> <p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> ADM decision on request for non-compliance with Fit-up Standards as required</li> <li><input type="checkbox"/> Market Survey Result</li> <li><input type="checkbox"/> Market Analysis Report</li> <li><input type="checkbox"/> Preliminary Workplace 2.0 Accreditation Evaluation Grid</li> <li><input type="checkbox"/> Signed Project Charter</li> <li><input type="checkbox"/> Completed Briefing Note for sole source negotiation if required</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> Risk Management Plan</li> <li><input type="checkbox"/> Completed approval Documents for PPA or LPA</li> <li><input type="checkbox"/> Completed TB Submission Documents if required</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Completed feedback</li> <li><input type="checkbox"/> Completed project files</li> <li><input type="checkbox"/> Lessons Learned</li> </ul>	
	Deliverables	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Statement of Requirements (SoR)</u> with Tenant Requirements Package attached (for space project)</li> <li><input type="checkbox"/> PCRA (optional)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Preliminary Project Plan (PPP)</u></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Feasibility Report (FR)</u></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Investment Analysis Report (IAR)</u></li> <li><input type="checkbox"/> PCRA reconfirmed or updated</li> </ul> <p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <u>TB Submission</u> (if required)</li> <li><input type="checkbox"/> <u>Briefing Note</u> (if sole source lease)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Identification Close Out Document (ICOD)</u></li> </ul>
	Control Point	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Statement of Requirements Approval (SoRA)</u></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Preliminary Project Plan Approval (PPPA)</u></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Feasibility Report Approval (FRA)</u></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Preliminary Project Approval (PPA)</u></li> </ul> <p><u>Space Specific</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Lease Project Approval (LPA)</li> </ul>	

**REMARKS:** Other available Roadmaps: [Design-Bid-Build Projects](#), [OGD Design-Bid-Build Projects](#), [Design-Build Projects](#), [Lease Projects](#), [Contaminated Sites](#)