

## Roadmap for Delivery Stage of Lease projects

(<http://www.tpsgc-pwgsc.gc.ca/biens-property/sngp-npms/bi-rp/route-road/location-lease/index-eng.html>)

For space projects over 3 000 m<sup>2</sup> rentable (regions) or 5 000 m<sup>2</sup> rentable (NCA/Parliamentary Precinct)

Stage 3 – Project Delivery				
	3.1 – Planning	3.2 – Design	3.3 – Implementation	3.4 – Close Out
Objective	Confirm the quality and completeness of the existing project information in an effort to develop and organize lease project delivery strategy.	Conclude a lease agreement, and come up with a design solution, which meets client functional and operational requirements while forming an integral part of the base building system in the leased premise.	Produce an end product of acceptable quality which meets client requirements.	Improve overall project performance and client satisfaction by documenting and assessing both product and process performance against pre-determined performance criteria.
Inputs	<ul style="list-style-type: none"> <li><input type="checkbox"/> Identification Close Out Document (ICOD)</li> <li><input type="checkbox"/> Project Approval (PA), Expenditure Authority (EA) and Lease Contract Approval (LCA) (if obtained for project which required TB submissions), and Sole Source approval, if required</li> <li><input type="checkbox"/> Approved Feasibility Report (AFR)</li> <li><input type="checkbox"/> Approved Investment Analysis Report (IAR)</li> <li><input type="checkbox"/> Preliminary Workplace 2.0 Accreditation Evaluation Grid</li> <li><input type="checkbox"/> Market Survey</li> <li><input type="checkbox"/> Market Analysis Report</li> <li><input type="checkbox"/> Functional Program (if required)</li> <li><input type="checkbox"/> Space Requirement</li> <li><input type="checkbox"/> Project Charter</li> <li><input type="checkbox"/> Project Complexity and Risk Assessment (PCRA) (if required)</li> <li><input type="checkbox"/> Environmental Compliance Management Program (ECMP) Checklist (if required)</li> <li><input type="checkbox"/> Preliminary Identification of Environmental Services Required (PIESR) (if required)</li> <li><input type="checkbox"/> Other currently known project parameters</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Approved PMP (if required)</li> <li><input type="checkbox"/> Updated Project Charter (if required)</li> <li><input type="checkbox"/> Lease Contract Award Recommendation</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> ADM decision on non-compliance request(s) to the <a href="#">Government of Canada Workplace 2.0 Fit-up Standards</a> as required</li> <li><input type="checkbox"/> Award Lease Contract (Signed Lease Agreement)</li> <li><input type="checkbox"/> RFP/TOR (mandate) for Consultant Services</li> <li><input type="checkbox"/> Sub-agreement with landlord for consulting services as part of the design process</li> <li><input type="checkbox"/> Cost estimates</li> <li><input type="checkbox"/> Client signoffs on design documents</li> <li><input type="checkbox"/> If applicable, confirmed or amended PA/EA Documentation (including revised IAR, if required)</li> <li><input type="checkbox"/> PMP with updated parameters</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> ADM decision on non-compliance request(s) to the <a href="#">Government of Canada Workplace 2.0 Fit-up Standards</a> as required</li> <li><input type="checkbox"/> Signed contracts</li> <li><input type="checkbox"/> Sub-agreement with landlord for construction of lease premises</li> <li><input type="checkbox"/> Signed Interim Certificate of Completion of Lessee's Improvements</li> <li><input type="checkbox"/> Completed Commissioning Report, O&amp;M Manuals as As-Built Documentation</li> <li><input type="checkbox"/> Site transferred to Real Property Manager</li> <li><input type="checkbox"/> PMP with updated parameters</li> </ul>
Tasks / Activities	<p><b>Step One: Start-up Stage</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Refine <a href="#">Project Team</a></li> <li><input type="checkbox"/> Update Functional Program, as required</li> <li><input type="checkbox"/> Create <a href="#">Project Management Plan</a></li> <li><input type="checkbox"/> Update <a href="#">Project Charter</a></li> <li><input type="checkbox"/> Update Project File Structure (financial codes, confirm funds, etc.)</li> </ul> <p>Note – Project Management Plan and Project Charter are not required for a Lease Renewal project where there is no fit-up</p> <p><b>Step Two: Undertake Leasing Acquisition</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare Leasing Mandate when lease acquisition is required</li> <li><input type="checkbox"/> Proceed with the acquisition process as per the PA (<a href="#">Framework and Processes for Leasing of Real Property in PWGSC</a>)</li> <li><input type="checkbox"/> Prepare document for seeking Lease Contract Approval (LCA)</li> </ul> <p>Note – where TB approval was required for PA/EA, LCA authority may have been obtained in the Analysis Phase</p>	<p><b>Step One: Award Lease</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Seek Lease Contract Approval</li> <li><input type="checkbox"/> Sign <a href="#">Lease Contract Award Letter</a></li> </ul> <p><b>Step Two: Procure</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare RFP/TOR (mandate) for consultant services</li> <li><input type="checkbox"/> Procure consultant services</li> <li><input type="checkbox"/> Complete the <a href="#">Project Team</a></li> <li><input type="checkbox"/> Sign <a href="#">Sub-Agreement with Landlord for Consulting Services and/or Construction Documents</a> (if provided by the Lessor)</li> </ul> <p><b>Step Three: Develop Design</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Develop concept and design for approval by client</li> <li><input type="checkbox"/> Prepare furniture layouts for approval by client</li> <li><input type="checkbox"/> Prepare moving plans for approval by client</li> <li><input type="checkbox"/> Prepare furniture, equipment and systems procurement documents</li> <li><input type="checkbox"/> Review for consistency with the <a href="#">Government of Canada Workplace 2.0 Fit-up Standards</a> and the Space Allocation Standards at each design activity and obtain approval as required</li> <li><input type="checkbox"/> Update the Workplace 2.0 Accreditation Evaluation Grid</li> </ul> <p><b>Step Four: Reaffirm PA/EA</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare cost estimate</li> <li><input type="checkbox"/> Confirm PA/EA</li> <li><input type="checkbox"/> Revise IAR, if amended PA/EA needs to be sought</li> <li><input type="checkbox"/> Update key parameters of the PMP</li> </ul>	<p><b>Step One: Procure (Construction and other contractors/suppliers)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Obtain construction documents (specs and drawings for fit-up or leasehold improvements)</li> <li><input type="checkbox"/> Conduct review at 33-66-99% (for fit-up projects) to ensure compliance with the <a href="#">Government of Canada Workplace 2.0 Fit-up Standards</a> and Space Allocation Standards, and obtain approvals as required</li> <li><input type="checkbox"/> Obtain tender calls by landlord</li> <li><input type="checkbox"/> Award contracts to assure delivery of project</li> <li><input type="checkbox"/> Sign Sub-Agreement with Landlord for construction of lease premises</li> </ul> <p><b>Step Two: Construct</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Administer all contracts</a></li> <li><input type="checkbox"/> Proceed to site quality control of construction by landlord</li> </ul> <p><b>Step Three: Accept Work</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Inspection and commissioning of all deliverables</li> <li><input type="checkbox"/> Assemble as-built documents</li> <li><input type="checkbox"/> Ensure training is provided and manuals delivered</li> <li><input type="checkbox"/> Issue Interim Certificate of Completion of Lessee's Improvements</li> <li><input type="checkbox"/> Return contracts securities (including hold-backs)</li> <li><input type="checkbox"/> Transfer site to Real Property Manager</li> <li><input type="checkbox"/> Client move-in</li> <li><input type="checkbox"/> Update key parameters of the PMP</li> </ul>	<p><b>Step One: Close-outs of Contracts</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Perform post-occupancy inspection</li> <li><input type="checkbox"/> Issue Final Certificate of Completion of Lessee's Improvements</li> <li><input type="checkbox"/> Perform Warranty Activities</li> <li><input type="checkbox"/> Process final payments and close contracts as per financial and contracting regulations</li> </ul> <p><b>Step Two: Close Project</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Execute final space measurement</li> <li><input type="checkbox"/> Ensure Occupancy Instrument is in place</li> <li><input type="checkbox"/> Gather End-User Feedback, and document lessons learned</li> <li><input type="checkbox"/> Submit the completed Workplace 2.0 Accreditation Evaluation Grid to <a href="mailto:WP2.MT2@tpsgc-pwgsc.gc.ca">WP2.MT2@tpsgc-pwgsc.gc.ca</a></li> <li><input type="checkbox"/> Send as-builts to the regional Geomatics group to allow update of current drawings</li> <li><input type="checkbox"/> Complete administrative close out activities</li> <li><input type="checkbox"/> Complete Close Out Document</li> <li><input type="checkbox"/> Complete final recording of documents</li> </ul>
Outputs	<ul style="list-style-type: none"> <li><input type="checkbox"/> Updated Project Charter (if required)</li> <li><input type="checkbox"/> Lease Contract Award Recommendation</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> ADM decision on non-compliance request(s) to the <a href="#">Government of Canada Workplace 2.0 Fit-up Standards</a> as required</li> <li><input type="checkbox"/> Signed Lease Contract award Letter</li> <li><input type="checkbox"/> RFP/TOR (mandate) for Consultant Services</li> <li><input type="checkbox"/> Sub-agreement with landlord for consulting services as part of the design process</li> <li><input type="checkbox"/> Cost estimates</li> <li><input type="checkbox"/> Client signoffs on design documents (vertical stacking, horizontal blocking, furniture, moves, cabling, security, etc.)</li> <li><input type="checkbox"/> Revised IAR if required</li> <li><input type="checkbox"/> PMP with updated parameters</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> ADM decision on non-compliance request(s) to the <a href="#">Government of Canada Workplace 2.0 Fit-up Standards</a> as required</li> <li><input type="checkbox"/> Signed contracts</li> <li><input type="checkbox"/> Sub-agreement with landlord for construction of lease premises</li> <li><input type="checkbox"/> Signed Interim Certificate of Completion of Lessee's Improvements (Product Turn Over)</li> <li><input type="checkbox"/> Completed Commissioning Report, O &amp; M Manuals and As-Built Documentation</li> <li><input type="checkbox"/> Site Transferred to Real Property Manager</li> <li><input type="checkbox"/> PMP with updated parameters</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Final Certificate of Completion of Lessee's Improvements</li> <li><input type="checkbox"/> Final Records Documents</li> <li><input type="checkbox"/> Consultant Evaluation Report</li> <li><input type="checkbox"/> Post-Occupancy Inspection Report</li> <li><input type="checkbox"/> Final space measurement</li> <li><input type="checkbox"/> Updated/Final PMP</li> <li><input type="checkbox"/> Final Lessons Learned</li> </ul>
Deliverables	<ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Project Management Plan (PMP)</a> (if required)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Approval Documents for confirmed or amended PA/EA</a></li> <li><input type="checkbox"/> For amended PA/EA, reconfirm or update PCRA</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Product Turn-over (PTO) (Interim Certificate of Completion of Lessee's Improvements)</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Close Out Document (COD)</a></li> </ul>

Control Point	<input type="checkbox"/> <b>Project Management Plan Approval (PMPA) / Confirmed Project Approval</b>  Note: Prior to awarding the lease contract, PA and EA are to be confirmed to ensure that the terms and conditions of the proposed lease contract are within the approved project parameters. The PA and EA will need to be reaffirmed again in the Design Phase, once the fit-up costs are estimated (when the substantive cost estimate is received).	<input type="checkbox"/> Amended or reconfirmed PA/EA based upon both lease award letter and fit-up estimated costs	<input type="checkbox"/> <a href="#">Turn-over approval (TOA)</a>	<input type="checkbox"/> <a href="#">Close Out Document Approval (CODA)</a>  <h2 style="text-align: center;">PROJECT COMPLETION</h2>
---------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------

**REMARKS:** Other available Roadmaps: [Asset Projects](#), [Space Projects](#), [Design-Bid-Build Projects](#), [ODG Design-Bid-Build Projects](#), [Design-Build Projects](#), [Contaminated Sites](#)